

REORGANIZATION PLAN SUBMITTAL SHEET

(Each municipality in a School Union must be indicated separately.)

School Administrative Units Included in APPROVED Notice of Intent	School Administrative Units Submitting Reorganization Plan
	Litchfield School Department
	Sabattus School Department
	Wales School Department
	Litchfield, Sabattus, and Wales Community School District
	<input checked="" type="checkbox"/> <i>Initial Receipt</i> <input type="checkbox"/> <i>Revision (Version # _____)</i>
	<i>Received: 12 / 4 / 07</i>
	<i>Initial Review: 12 / 5 / 07</i>
	<i>Review Completed: ___ / ___ / ___</i>
	<i>Commissioner Response</i>
	<input type="checkbox"/> <i>Approved</i> <input type="checkbox"/> <i>Revise & Return</i>
	<i>Returned to SAU: ___ / ___ / ___</i>
	<i>Revisions due to Department: ___ / ___ / ___</i>
	<i>Initial Plan Received (if revision): ___ / ___ / ___</i>

Contact Information:

RPC Chair

Name: Robert E. English
 Address: 395 Leeds Junction Road
 Wales, Maine 04280
 Telephone: 933-5232
 email: English999@aol.com

Date Plan Submitted: November 30, 2007

Proposed RSU Operational Date: July 1, 2009

<u>Joan M. Thomas^{v.P.}</u> Signature/Title	<u>11/30/07</u> Date	<u>Litchfield School Department</u> SAU
<u>Sheila J. Cofford, Chair</u> Signature/Title	<u>11/28/07</u> Date	<u>Sabattus School Department</u> SAU
<u>W. G. L. CHACE</u> Signature/Title	<u>11/28/07</u> Date	<u>Wales School Department</u> SAU
<u>Joan M. Thomas^{Chair}</u> Signature/Title	<u>11/30/07</u> Date	<u>Litchfield, Sabattus, and Wales Community School District</u> SAU

_____ Signature/Title	_____ Date	_____ SAU

Reorganization Plan Cover Sheet
(Please attach Reorganization Plan as Exhibit A)

Required Elements							
Law Reference Item Number Sub-Chapter 2	Item	N/A	Complete	In Progress	Not Yet Started	Identified Barrier ¹	Need Assistance ²
3.A(1)	SAUs included in RSU		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(2)	Size of governing body		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Composition of governing body		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Apportionment of governing body		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(3)	Method of voting of the governing body		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(4)	Composition of local school committees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Powers of local school committees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Duties of local school committees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(5)	Disposition of real & personal school property		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(6)	Disposition of existing school indebtedness (if not using provisions of section 1506)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Disposition of lease-purchase obligations (if not using provisions of section 1506)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(7)	Assignment of school personnel contracts		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Assignment of school collective bargaining agreements		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Assignment of other school contractual obligations		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(8)	Disposition of existing school funds and existing financial obligations		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(9)	Transition plan that addresses the development of a budget for the first school year		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Transition plan that addresses interim personnel policies		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(10)	Documentation of the public meeting(s) held to prepare or review reorganization plan		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(11)	Explanation of how units that approve reorganization plan will proceed if one or more units do not approve the plan		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(12)	Estimate of cost savings to be achieved		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.A(13)	Such other matters as the governing bodies of the school administrative units in existence on the effective date of this chapter may determine to be necessary		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹ Please explain why this is a barrier and what assistance you need to remove this barrier on the next page.

² Please explain what assistance you need to complete this portion of your plan, and state from whom you need assistance, on page 3.

Parameters for Plan Development							
Law Reference Item Number Sub-Chapter 2	Item	N/A	Complete	In Progress	Not Yet Started	Identified Barrier ³	Need Assistance ⁴
3.B(1)	Enrollment meets requirements (2,500 except where circumstances justify an exception ⁵)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sec. XXXX-36, Parameter B	When viewed in conjunction with surrounding proposed units, may not result in one or more municipalities being denied the option to join an RSU		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.B(2)	Comprehensive programming for all students grades K - 12.		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Includes at least one publicly supported high school		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.B(3)	Consistent with policies set forth in section 1451		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.B(4)	No displacement of teachers		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No displacement of students		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No closures of schools existing or operating during school year immediately preceding reorganization, except as permitted under section 1512		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sec. XXXX-26, Parameter F	The plan must address how the school administrative unit will reorganize administrative functions, duties and noninstructional personnel so that the projected expenditures of the reorganized 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 ⁶		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaborative Agreements							
						Yes	No
Does your plan currently include information/documentation on collaborative agreements? (not required, but encouraged)						<input checked="" type="checkbox"/>	<input type="checkbox"/>

Exceptions to 2,500 minimum

Actual number of students for which the RSU is fiscally responsible: 1,600

Exception	Exception Claimed in Plan	Documentation Provided? (Please attach as Exhibit B)	
		Yes	No
Geography	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demographics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Economics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Population Density	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Unique Circumstances	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

³ Please explain why this is a barrier and what assistance you need to remove this barrier on the next page.

⁴ Please explain what assistance you need to complete this portion of your plan, and state from whom you need assistance, on page 3.

⁵ Please note in the *Exceptions to 2500 minimum* section on next page

⁶ This requirement is only for those who plan to be operational as an RSU in fiscal year 2008-2009, in accordance with a Reorganization Plan that is approved by the Commissioner and by the voters.

Explanation of Barriers –

Please use this section to explain any/all barriers identified on the previous page as a barrier in completing your Reorganization Plan.

Law Reference/Required Element	Explanation of the barrier

Assistance Needs –

Please use this section to describe your needs for assistance and from whom you need assistance.

Law Reference/Required Element	Explanation of your assistance need	Assistance needed from whom?

REORGANIZATION PLAN

SAU Submitting: Please see "Reorganization Plan Submittal Sheet"

Contact Information: Robert E. English, RPC Chair

Date Submitted by SAU: November 30, 2007

Proposed RSU Operational Date: July 1, 2009

POLICY OBJECTIVES

It is declared the policy of the State to provide sufficient resources to support the reorganization of school administrative units into regional, state-approved units of school administration to provide:

1. Opportunity. Equitable educational opportunity for all students to demonstrate achievement of the content standards of the State's system of learning results established in section 6209;

2. 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;

3. Delivery. Uniformity in the delivery of academic programs that meet the requirements of the system of learning results established in section 6209;

4. Tax rates. A greater uniformity of tax rates for the support of schools;

5. Sustainability. The efficient use of limited resources in order to achieve long-term sustainability and predictability in the support of public schools;

6. 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;

7. School choice. The preservation of opportunities for choice of schools;

and

8. **Services.** The maximization of opportunities to deliver services that can more effectively be provided in larger districts than from within smaller units or individual schools.

Regional school units shall provide kindergarten to grade 12 public education, in accordance with Title 20-A, and shall develop and implement policies that address efficiencies in administration, educational programming and the sharing of community resources for the continuous improvement of student achievement and the preparation of students for college, careers and citizenship.

PARAMETERS FOR PLAN DEVELOPMENT

In order for the plan to be approved by the Commissioner, the governing bodies of school administrative units shall work within the following parameters.

1. The proposed regional school unit must serve not fewer than 2,500 students, except where circumstances relating to the following factors justify an exception:

- (a) Geography, including physical proximity and the size of the current school administrative unit;
- (b) Demographics, including student enrollment trends and the composition and nature of communities in the regional school unit;
- (c) Economics, including existing collaborations to be preserved or enhanced and opportunities to deliver commodities and services to be maximized;
- (d) Transportation;
- (e) Population density; or
- (f) Other unique circumstances including the need to preserve existing or developing relationships, meet the needs of students, maximize educational opportunities for students and ensure equitable access to rigorous programs for all students.

When circumstances justify an exception to the size requirement of 2,500 students, the unit must serve as close to 2,500 students as possible and in no case, except for coastal islands and schools operated by tribal school committees, may it serve fewer than 1,200 students.

2. The plan must provide comprehensive programming for all students from kindergarten to grade 12 and must include at least one publicly supported secondary school.

3. The plan must be consistent with the **POLICY OBJECTIVES** set forth above.

4. The plan may not displace teachers or students or close any schools existing and operating during the school year immediately preceding reorganization, except as permitted as follows:

20-A MRSA

§ 1511. Supermajority vote to close school in the regional school unit

A school operated within the regional school unit may not be closed unless closure of the school is approved at a regular or special meeting of the regional school unit board by an affirmative vote of 2/3 of the elected membership or voting power of the regional school unit board.

§ 1512. Closing school

1. Vote; cost of election. A school in a member municipality of a regional school unit may not be closed unless the voters in the member municipality vote on the article in accordance with the referendum procedure set forth in this chapter.

"Article: Do you favor authorizing the board of directors of (name of regional school unit) to close (name of school)?"

Yes No

The additional cost of keeping the school open has been estimated by the regional school unit board to be \$"

The election must be conducted within that member municipality only, pursuant to department rule, and the costs of the election are borne by the regional school unit.

2. Expense of keeping the school open. If the voters vote by a majority vote to keep the school open, the member municipality is liable for some additional expense for actual local operating costs and transportation operating costs as defined in section 15672. The determination of costs is subject to the approval of the commissioner. The cost to be borne by the municipality voting to keep a school open is the amount that would be saved if the school were closed. Any additional costs that must be borne by the member municipality must be part of the article presented to the voters at the meeting to determine whether the school should remain open.

3. Costs and procedures during subsequent years. During any year subsequent to the year during which a school remains open contrary to the regional school unit board's vote to close that school as a result of a municipal referendum, the school will be open without any additional cost to the municipality except as described in paragraphs A and B.

A. If the regional school unit board again votes to close the school and the voters of the member municipality again vote to keep the school open, as described in this subsection, then the school will remain open and the member municipality will be obligated to pay the additional costs as described in subsection 2.

B. If the regional school unit board again votes to close the school and the voters of the member municipality fail to vote to keep the school open, then the school is closed. In this event, the school may be reopened only if the regional school unit board votes to reopen the school.

4. Definition of school closing. For purposes of this section, a school closing is any action by the regional school unit board that has the effect of providing no instruction for any students at that school.

5. Method of payment by liable municipality. If a municipality is liable for additional expenses as determined in subsection 3, paragraph A, then the amount of this additional expense must be subtracted from the regional school unit budget before each member municipality's assessment is computed. This additional expense must be paid by the member municipality that is liable in equal monthly amounts, unless the regional school unit and that member municipality mutually agree to another method of payment.

6. Multiple municipalities. If a school proposed for closure is an elementary school that serves students from

more than one municipality, the article set forth in subsection 1 must be submitted to the voters in each of the municipalities that sent all elementary students from that municipality to the school. If the article is approved by a majority of the voters in each of the municipalities, the school is not closed and the municipalities share in the costs under this section in the same proportion as they share the current operating costs of the school.

REQUIRED ELEMENTS OF THE PLAN

1. The units of school administration to be included in the proposed reorganized regional school unit. *Please describe.*

2. The size, composition and apportionment of the governing body. This discussion remains ongoing and no final decision has been met as of this date.

3. The method of voting of the governing body. Weighted Vote by municipality.

4. The composition, powers and duties of any local school committees to be created. Not Applicable, no local school boards are proposed as part of the plan.

5. The disposition of real and personal school property. All real and personal school property in use/owned by any of the current SAU's forming this new RSU as of June 30, 2008 will be transferred to the new RSU effective July 1, 2009.

6. The disposition of existing school indebtedness and lease-purchase obligations if the parties elect not to use the provisions of section 1506 regarding the disposition of debt obligations. Section 1506 will be used for disposition of existing school indebtedness and lease-purchase obligations.

7. The assignment of school personnel contracts, school collective bargaining agreements and other school contractual obligations. Not yet determined.

8. The disposition of existing school funds and existing financial obligations, including undesignated fund balances, trust funds, reserve funds and other funds appropriated for school purposes.

A. Existing Financial Obligations. Pursuant to Section XXXX-36(5) the disposition of existing financial obligations is governed by this plan.

Existing financial obligations shall include the following:

- (i) all accounts payable;
- (ii) to the extent not included as accounts payable, any financial obligations which under generally accepted accounting principles would be considered expenses of the SAU for any year prior to the year the RSU becomes operational, whether or not such expenses were budgeted by the SAU in the year the obligations were incurred, including for example summer salaries and benefits; and
- (iii) all other liabilities arising under generally accepted accounting principles that can be reasonably estimated and are probable.

Each SAU shall satisfy its existing financial obligations from all legally available funds. If an SAU has not satisfied all of its existing financial obligations, the SAU shall transfer sufficient funds to the region to satisfy its remaining existing financial obligations, and the regional school unit board shall be authorized to satisfy those existing financial obligations on behalf of the SAU. If the SAU does not transfer to the region sufficient funds to satisfy its existing financial obligations, then to the extent permitted by law, the regional school unit board may satisfy those obligations from balances that the SAU transfers to the region. If the available balances transferred are insufficient to satisfy the SAU's existing financial obligations, or are not legally available for that purpose, the regional school unit board may take any action permitted by law so that all of the municipalities of the region are treated equitably with respect to the unsatisfied existing financial obligations of an SAU. For example, to the extent permitted by law, the regional school unit board may satisfy the unpaid existing financial obligations of an SAU in the same manner and with the same authority as for unassumed debt under the provisions of 20-A M.R.S.A. § 1506(4).

Additionally, to the extent permitted by law, if in the judgment of the regional school unit board it must raise funds from all its members to satisfy existing financial obligations of an SAU, the regional school unit board also shall be authorized to raise additional amounts for the purpose of making equitable distributions (which may be made in the form of credits against assessed local shares of the region's approved budget) to those region members that would otherwise bear costs attributable to unsatisfied existing financial obligations of an SAU for which they had no financial responsibility. The intent of the preceding sentence is that financial responsibility for unsatisfied existing financial obligations of an SAU be borne by its members and not by the other members of the region.

B. Remaining Balances. The balance remaining in the SAU's school accounts after the SAU has satisfied existing financial obligations in accordance with this plan shall be paid to the treasurer of the regional school unit, verified by audit and used to reduce that SAU's contribution as provided by Section XXXX-43(4). Unless the Legislature otherwise provides, in the case of a school administrative district, community school district or other regional school district (collectively, "district"), the school board of the district shall specify in writing to the regional school unit board how the region shall allocate transferred remaining balances between district members. Unless the Legislature otherwise provides, if the district board has not specified in writing to the regional school unit board how this allocation shall occur, then the transferred remaining balances shall be credited to the district's members in proportion to their respective shares of that portion of the total local costs of the region allocable to all of the district's members for the operational year.

Transfers of remaining balances may occur within the period specified by Section XXXX-43(4), or, as may be preferable in the case of a district, at any time before the district has closed its accounts and ceased normal operations.

C. Reserve Funds. SAUs shall transfer remaining balances of reserve funds to the regional school unit. Unless otherwise provided by applicable law, a transferred reserve fund shall be used in accordance with its original purpose to benefit a school or schools of the SAU. Transferred reserve funds shall be subject to Title 20-A M.R.S.A. § 1491, except that the transfer of funds in a reserve fund or a change in purpose of the fund may only occur in such manner that the funds continue to benefit the members of the SAU that transferred that reserve fund to the region.

D. Scholarship Funds. SAUs shall transfer remaining balances of scholarship funds to the region. Scholarships shall be limited to the original pool of potential recipients unless otherwise provided by the donor or by applicable law.

E. Trust Funds. SAUs shall transfer trust funds to the region. The regional school union board shall be deemed the successor trustee for all purposes, except as provided by the trust or by applicable law.

9. A transition plan that addresses the development of a budget for the first school year of the reorganized unit and interim personnel policies. To be determined.

10. Documentation of the public meeting or public meetings held to prepare or review the reorganization plan. Public Meetings of the RPC were held on November 7th, 14th, and 26th, 2007. Additional meetings will be held to complete work on the plan once DOE has responded to our submittal. Copies of the minutes of the three meetings are attached to this plan. Additionally, consolidation has been on the agenda for every board meeting of all SAU's since February, 2007 and each SAU's board held a public meeting in their own town devoted solely to a presentation and public discussion of consolidation and plans for reorganization. All options that were available at the time of the public meetings were discussed and feedback was received. Exhibit C contains supporting documentation of these meetings.

11. An explanation of how units that approve the reorganization plan will proceed if one or more of the proposed members of the regional school unit fail to approve the plan. This reorganization plan's proposed members all are members of a current 9-12 CSD. This plan must be approved by a majority of voters of the CSD member towns in order to be approved. Should it fail to receive a majority of the votes the process will need to be started over.

12. An estimate of the cost savings to be achieved by the formation of a regional school unit and how these savings will be achieved. To be determined.

13. Such other matters as the governing bodies of the school administrative units in existence on the effective date of this chapter may determine to be necessary. Not applicable.

COLLABORATIVE AGREEMENTS

Collaborative agreements are agreements to share the responsibility for and cost of the delivery of certain administrative, instructional and non-instructional functions. "Collaborative agreements" includes, but is not limited to:

- A. Shared purchasing or contract agreements;
- B. Agreements for shared staff or staff training;
- C. Agreements to share technology or technology support;
- D. Agreements to provide special education programs and support services;
- E. Agreements to share accounting, payroll and financial management services;

- F. Agreements to coordinate transportation routing and vehicle maintenance;
- G. Agreements to share food service planning and purchasing; and
- H. Agreements to coordinate energy and facilities management.

A school administrative unit may enter into collaborative agreements with other school administrative units and, whenever possible, with local and county governments and State Government, to achieve efficiencies and reduce costs in the delivery of administrative, instructional and non-instructional functions.

A collaborative agreement between 2 or more previous education units may remain in effect after July 1, 2008. Notwithstanding any other provision of law to the contrary, collaborative agreements in existence on the effective date of this section may be extended or modified by the parties to the collaborative agreement.

Please describe any collaborative agreements proposed by the RSU.

DOE USE ONLY: Date Received _____

DOE USE ONLY: Date Reviewed/Approved _____

DOE USE ONLY: Date of Commissioner Response re: Approval _____

DOE USE ONLY: Date Returned to SAU for Revisions _____

DOE USE ONLY: Due Date for Revisions from SAU _____

DOE USE ONLY: Date Revisions Reviewed/Approved _____

DOE USE ONLY: Date of Commissioner Response re: Revised Plan _____

Litchfield, Sabattus, and Wales Reorganizational Planning Committee

2007-2008



Setting the direction for the new RSU

Litchfield

Robert Gordon – SC

Muriel Bonin – M

Vicki Russell – C

Sabattus

Robert Gayton, Jr. – SC

Gregory Gill – M

Mike Tardy – C

Wales

Robert English – SC

Carrie Ivey – M

Patty Auge – C

Facilitator

Bill Cumming

Superintendent's Office

Susan Hodgdon, Superintendent (non-voting)

Christopher Trenholm, Business Manager (non-voting)

Note:

SC = School Committee representative

M = Municipal representative

C = Community representative

Litchfield, Sabattus and Wales Reorganizational Planning Committee
Meeting Minutes - Monday, November 26th - Central Office



Present; Bob English, Christopher Trenholm, Susan Hodgdon, Vicki Russell, Bill Cumming, Greg Gill, Patty Auge and Mike Tardy

Absent: Muriel Bonin, Rob Gayton, Rob Gordon and Carrie Ivey

Audience Attendance: Paul Loesberg (Sabattus Selectman) and Brian Albert (Wales Central School Principal)

Minutes: 11/07/07 and 11/14/07 minutes; approved, all in favor.

Housekeeping Note: Bob spoke with a reporter from the Kennebec Journal.

Handouts: Reorganization Plan Cover Sheet and Reorganization Plan. These handouts were discussed and reflect this committee's motions and answers to the 13-steps. With the addition of our actual name, from the Charter, minutes of these RPC meetings, acknowledgements of other public meetings regarding reorganization, and signatures of approval to this plan and its direction, from the individual school board chairs, the plan will be ready to send off to the Department of Education, by December 1st. It is anticipated that we will hear back by December 15th and we'll meet again in January to continue from there.

A review of the Plan including the required "Reorganization Plan Submittal Sheet", the "Reorganization Plan Cover Sheet" (a check list) was conducted by the members present. All agreed that the presented draft of the Plan was an accurate statement of what had been agreed upon by the committee to this point. It is understood that the Plan is not yet fully complete, but is as complete as time has allowed. Additional documentation will be added to reflect ongoing collaboration ideals with SAD-11.

Reminders; Our next meeting is scheduled for Monday, January 7th, at Central Office, from 6-8p.

Hodgdon, Susan

From: English999@aol.com
Sent: Thursday, November 15, 2007 9:53 PM
To: robert.english@maine.gov; vicruss58@yahoo.com; Hodgdon, Susan;
RGordon13@RoadRunner.com; Patricia.Auge@va.gov; civey@monmouthme.org;
townmanager@sabattus.org; mbonin2404@fairpoint.net; Trenholm, Christopher;
bill@oneperson.net; mtardy@roadrunner.com
Subject: Meeting with SAD-11

Susan, Chris, Vicki and I met with SAD-11's superintendent, business manager, and members of their board to continue discussions about possible consolidation. They have had the financial numbers reviewed and reworked by Dummond and Woodsum and no matter what method they used - evaluation, number of student, population, etc they still see a hugh cost shift to them and they are not willing to assume that additional cost burden. We talked of ways we may be able to work together in providing better educational opportunities to our students, and possible joint purchasing options as ways to colaborate and reduce costs.

They are expected to approve their Alternative Plan at their meeting tonight and it will be a stand along reorganization from the SAD to an RSU composed of the same units currently in the SAD. We advised that we are going to be submitting a Reorganization Plan to combine our current 4 SAU's into one singe RSU without the addition of any non-Union 44 members.

Very brief discuission was held around the what if we (both) are not approved, and possible legislative action but spent very little time here as it was all unknown. Our meeting scheduled for the 28th has been cancelled.

Susan, Chris, or Vicki - please add to this for anything I left out.

Bob

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District	2006 State Valuation	# of Pupils	2006 Valuation Per Pupil	FY 2008 Required		FY 2008		FY 2008 Additional Local Funds Per Pupil	%
				Local Contribution @ 7.44 mills	Local Contribution Per Pupil	Additional Local Funds	Additional Local Funds		
Gardiner	272,300,000	950	286,632	2,025,912	2,133	552,967	582		
Pittston	140,850,000	421	334,561	1,047,924	2,489	286,030	679		
Randolph	68,600,000	319.5	214,710	510,384	1,597	139,294	436		
West Gardiner	168,000,000	512.5	327,805	1,249,920	2,439	341,156	666		
Litchfield (K-12)	237,250,000	599	396,077	1,765,140	2,947	1,134,205	1,893		
Sabattus (K-12)	218,900,000	766	285,770	1,628,616	2,126	1,394,911	1,821		
Wales (K-12)	78,150,000	268.5	291,061	581,436	2,165	579,162	2,157		
		3836.5		8,809,332		4,427,725			
Litchfield (K-8)	157,771,250	399							
Sabattus (K-8)	144,036,200	505.5							
Wales (K-8)	52,923,180	182.5							
CSD #15									
Litchfield	79,478,750	200							
Sabattus	74,863,800	260.5							
Wales	25,226,820	86							

Litchfield, Sabattus and Wales Reorganizational Planning Committee
Meeting Minutes – Wednesday, November 14th (Oak Hill High School)



Present; Bob English, Mike Tardy, Greg Gill, Christopher Trenholm, Rob Gordon, Bill Cumming, Susan Hodgdon, Muriel Bonin, Vicki Russell, Rob Gayton and Patty Auge

Excused: Carrie Ivey

Audience Attendance: Paul ~~Lobsh~~

A handwritten signature in black ink, appearing to read "Lobsh". The signature is written in a cursive, somewhat slanted style.

Old Business:

#2; The size, composition and apportionment of the governing body. This had been tabled for more discussion. It was thought that either a 9 or 12 member board exist; a determination still hasn't been made.

#4; The composition, powers and duties of any local school committee to be created. The RPC will not be establishing local school boards as part of the "plan". We will state "Not Applicable" for this section. *Motion; N/A, by Vicki Russell and seconded by Greg Gill. Approved with one abstention.*

#3; The method of voting of the governing body. *Motion; Weighted vote by municipality. Motion made by Vicki Russell and seconded by Greg Gill. Approved with one disapproved.*

New Business:

#6; The disposition of existing school indebtedness and lease-purchase obligations if the parties elect not to use the provisions of section 1506 regarding the disposition of debt obligations. *Motion; Follow 1506, by Vicki Russell and seconded by Mike Tardy. Approved with one abstention.*

#7; The assignment of school personnel contracts, school collective bargaining agreements and other school contractual obligations. *Tabled for more discussion.*

#8; The disposition of existing school funds and existing financial obligations, including undesignated fund balances, trust funds, reserve funds and other funds appropriated for school purposes. It was decided to "cut/paste" the verbiage from Drummond and Woodsum to answer this one.

#9; A transition plan that addresses the development of a budget for the first school year of the reorganized unit and interim personnel policies. Motion; TBD, by Rob Gordon and seconded by Rob Gayton. All in favor.

#10; Documentatton of the public meeting or public meetings held to prepare or review the reorganization plan. We decided to point to all the public meetings held during this process, at school board level and at re-organization specific meetings.

#11; An explanation of how units that approve the reorganization plan will proceed if one or more of the proposed members of the regional school unit fail to approve the plan. Motion; CSD level vote with failure of that vote to begin the process again, by Rob Gordon and seconded by Mike Tardy. Approved with one disapproved.

#12; An estimate of the cost savings to be achieved by the formation of a regional school unit and how these savings will be achieved. Tabled.

#13; Such other matters as the governing bodies of the school administrative units in existence on the effective date of this chapter may determine to be necessary. We'll answer this one with N/A.

It was discussed that the Oak Hill Board needed to approved what the RPC has gotten done to this point and that of our direction and that Sabattus, Litchfield and Wales Board's should also approve, prior to submitting the plan.

Of note, we do not need to cut Special Education, Transportation, Repairs/Maintenance and Central Office for a savings of 5/5/5/50 percent...the state has already cut what they will fund us.

Reminders; Our next meeting is scheduled for Monday, November 26th, at Central Office, from 4-6p.

Litchfield, Sabattus and Wales Reorganizational Planning Committee
Meeting Minutes – Wednesday, November 7th



Present: Bill Cumming, Carrie Ivey, Christopher Trenholm, Rob Gayton, Mike Tardy, Greg Gill, Vicki Russell, Muriel Bonin, Patty Auge, Susan Hodgdon and Bob English.

Excused: Rob Gordon

Audience: Cathy McCue, Paul Løbsber *Loesberg*

New Business:

To choose a Chair/Vice Chair to the committee; A motion was made, by Rob Gayton, to select Bob English, as Chair to the committee. This motion was seconded, by (name). All in favor w/none opposed A motion was made, by (name) to select Rob Gayton, as Vice Chair to the committee. This motion was seconded, by (name). All in favor w/none opposed.

To determine the name of our committee, determined to be; ***Litchfield, Sabattus and Wales Reorganizational Planning Committee***. A motion was made, by Vicki Russell and seconded by Mike Tardy. All in favor w/none opposed.

To determine (1) the units of the school administration to be included in the proposed reorganized regional school unit; ***Litchfield, Sabattus, Wales and Oak Hill SAU's***. A motion, by Mike Tardy and seconded by Rob Gayton. All in favor w/none opposed.

To determine (5) the disposition of real and personal school property; ***all real and personal property being held and used by current SAU's as of June 30, 2009 will transfer to the new RSU effective July 01, 2009***. It was noted that steps will be taken to ensure that all assets will remain and not be removed from the schools during the ensuing period. A motion, by Mike Tardy and seconded by Vicki Russell. All in favor w/none opposed.

To determine (2) the size, composition and apportionment of the governing body; discussion around three options, to include 1 person-1 vote, region or at large. Tabled for more discussion. It was recommended that this committee think about how many members they believe should be on the new RSU's Board.

To determine (4) the composition, powers and duties of any local school committee to be created; discussion around the idea of an Advisory Committee that would act as a liaison between the Board and the Parents/Community. More discussion related to the actual

powers and duties of this advisory committee is needed. Tabled for verbiage pertaining to local school advisory committees, Bill is helping us out with this one.

A meeting with Gardiner regarding cost sharing is to be scheduled for next week and Rob Gayton, Bob English, Vicki Russell and Bill Cumming have agreed to be in attendance. Date/time to be determined.

Not discussed/determined;

- (3) The method of voting of the governing body.
- (5) The disposition of existing school indebtedness and lease-purchase obligations if the parties elect not to use the provisions of section 1506 regarding the disposition of debt obligations.
- (6) The assignment of school personnel contracts, school collective bargaining agreements and other school contractual obligations.
- (7) The disposition of existing school funds and existing financial obligations, including undesignated fund balances, trust funds, reserve funds and other funds appropriated for school purposes.
- (8) A transition plan that addresses the development of a budget for the first school year of the reorganized unit and interim personnel policies.
- (9) Documentation of the public meeting or public meetings held to prepare or review the reorganization plan.
- (10) An explanation of how units that approve the reorganization plan will proceed if one or more of the proposed members of the regional school unit fail to approve the plan.
- (11) An estimate of the cost savings to be achieved by the formation of a regional school unit and how these savings will be achieved.
- (12) Such other matters as the governing bodies of the school administrative units in existence on the effective date of this chapter may determine to be necessary.

Reminders:

Next Meeting is Wednesday, November 14th, 4-6p, at Oak Hill High School
Following Meeting is Monday, November 26th, 4-6p, at Central Office

School Reorganization – Union 44 Timeline of Contacts and Meetings

Susan Hodgdon, Superintendent

April 23, 2007: Conversation with Norm Higgins, DOE. I indicated that the Oak Hill CSD Board had held discussion at their last two meetings and, after studying the issue, their three top choices for consolidation partners were (in priority order): Monmouth and Richmond, SAD 52, and Lisbon. I also informed Norm that a School Reorganization Subcommittee had been formed and that the representatives were: Bob English (Wales), Rob Gordon (Litchfield), and Joline Lacoste (Sabattus). This subcommittee will reach out to other districts to set up meetings for conversations about potential partnerships.

April 30, 2007: I spoke with Tom Hanson, Superintendent in SAD 52. We agreed that we would bring together our two subcommittees for exploration of possible partnership. We discussed some of district's philosophies. A meeting time would be researched by each of us.

May 4, 2007: Spoke with Tom Hanson again. Two groups will meet on May 10th at Leeds School. Exchanged questions for the discussion.

May 10, 2007: Accompanied Bob English, Rob Gordon and Mike Beaulieu (Litchfield) to the meeting SAD 52 Board. Met for one hour.

May 29, 2007: Spoke with Shannon Welsh, Superintendent, Lisbon. Agreed that we should meet and talk.

July 18, 2007: Steve Cottrell, Superintendent, Monmouth, called in response to the letter I had sent, inviting talks for possible partnership. He described that they were looking at a number of districts and ours was on the list, but that he would know more within the next week after the upcoming RPC meeting on 7/23.

On this same date, I spoke with Leon Levesque, Superintendent, Lewiston. He inquired about any intentions we might have regarding partnering with Lewiston. I indicated that the Union 44 School Committees felt that such a combination would result in too large a district. He told me that he planned to submit an Alternative Plan.

July 20, 2007: I spoke again with Shannon Welsh, Superintendent, Lisbon. She indicated that they were looking at SAD 75, Brunswick, Freeport, and Union 44 and that their financial information had been submitted to DOE for preparation of the templates.

Second meeting of the School Reorganization Subcommittee. Reviewed responses to letters, both from districts and community members.

July 23, 2007: I spoke with Paul Knowles, Superintendent, SAD 11. I had called as a follow up to his letter asking Union 44 if it had any interest in meeting to discuss partnering. We agreed to set up a meeting of our two groups. SAD 11 had not had any success in its meetings to date.

July 26, 2007: I spoke with Martha Witham, Superintendent, Richmond. She stated that if Monmouth decided to go elsewhere, then they would be interested in partnering with us. Note: Monmouth decided to go in with Richmond.

August 6, 2007: I spoke again with Shannon Welsh, Lisbon, to establish details of a meeting with she and the Board Chair and the Union 44 School Reorganization subcommittee. Agreed to meet on August 20, 2007, in Lisbon.

August 21, 2007: Call from Shannon Welsh. The financial situation was not favorable to Lisbon at present, though they would keep Union 44 in mind.

August 27, 2007: Last conversation with Steve Cottrell, Monmouth. He spoke about Monmouth's geographic isolation.

September 18, 2007: Met with Bill Cumming, potential Facilitator for RPC. He agreed to serve as Facilitator for RPC.

October 15, 2007: At the Commissioner's meeting, the RPC and I agreed to resume conversation with SAD 11. Dick Spencer is doing work with them on financial alternatives.

October 16, 2007: Spoke with Dick Spencer to give him the financial information he needed to go forward with some alternate financial possibilities, including basing it on student enrollments.

November 9, 2007: Met with Paul Knowles, Supt., SAD 11. Reviewed Dick Spencer's template: our amounts over EPS is a potential barrier, but, if we were allowed to assume those amounts, it could improve the financial picture. Also, reorganization would help us reduce the amounts we are over EPS (economy of scale). Discussed academic aspects to a potential partnership with them. Possibilities include course offerings in AP, elementary Foreign Language, and others. Sports: they have a Swim program and we could share their Ice Hockey team (currently a club sport for us with Lisbon).

School Reorganization Subcommittee/RPC

May 10, 2007: Met with Board in SAD 52 to discuss possible partnering. Informed later that they did not wish to work with Union 44.

July 9, 2007: Letter to all residents of Litchfield, Sabattus, Wales, soliciting their interest in serving as RPC community representatives.

July 24, 2007: Informed by Monmouth Superintendent that their RPC had selected three potential partners and Union 44 was not one of the three.

July 6, 2007: Reviewed all geographically neighboring districts; evaluated potential for partnership. Letters to potential partners. Solicitation of community for membership on RPC. Each representative to work with their Selectmen to get a municipal representative for the RPC.

July 20, 2007. Reviewed options and status of these. The communities-wide mailing responses were reviewed. Set meeting with SAD 11.

August 20, 2007: Met with Superintendent and Board Chair in Lisbon to discuss possible consolidation. Informed by Superintendent Welsh on August 21st that the financial burden for Lisbon was a barrier, but that they would return to talks with Union 44 if their work with SAD 75 failed.

August 23, 2007: Reorganization Subcommittee met with SAD 11 team. Financial comparisons a stumbling block. Called Suzan Beaudoin – can member districts balance the costs rather than one district (Gardiner) assuming a disproportionate amount of costs? Answer: no. Another barrier: cannot find the 50% savings in combining the two Central Offices.

September 2007: Held public meetings at each of the School Committee meetings to discuss reorganization efforts and to gather public input. Sabattus - 9/5, Oak Hill CSD – 9/12, Litchfield – 9/19, and Wales – 9/26.

Note: School reorganization has continued to be an agenda item at every School Committee meeting since August 2007. Public participation is encouraged.

October 15, 2007: RPC, School Committee, and municipal officers attended the Commissioner's meeting. Agreed to resume meetings with SAD 11.

November 7, 2007: First meeting of the RPC. See attached minutes.

November 14, 2007: Second meeting of the RPC. See attached minutes.

November 15, 2007: Meeting with SAD 11 to discuss financial and academic aspects of partnering with them. See notes above in Superintendent section.

8/23/07

Gardiner

Sign In Sheet

Name	District	Role
Susan Hodgdon	Un 44	Supt.
Leon Duff	Facilitator	
Joline Lacoste	Sebattus	Board Member
MATTHEW SHEA	SAD II	Board Member
Steve Hunnewell	"	Board Member
PAUL D. KNOWLES	MPAD # 11	SUPERINTENDENT
BOB ENGLISH	UNION 44 (WALLES)	BOARD MEMBER.
Kathy Paradee	SAD II	Board Mbr
Becky Fler	SAD II	Board Mbr
Rob Lynch	Union 44 (Litchfield)	Board Mbr
Andy MacLean	MSAD #11	Mayor, Gardiner

Hodgdon, Susan

From: English, Robert [Robert.English@maine.gov]
Sent: Monday, August 20, 2007 9:24 AM
To: Steve Hunnewell
Cc: RGordon13@RoadRunner.com; Joline Lacoste; kparadee@sad11.k12.me.us; mshea@sad11.k12.me.us; bfles@sad11.k12.me.us; Paul Knowles; Dick Rogers; Hodgdon, Susan; English999@aol.com; eatsleepstatistics@gmail.com
Subject: RE: Consolidation Committee Schedule

Thanks, I have sent something to Matt stating Thursday is best for us at this time. As soon as you can give us a time (AM best) let us know so anything else we have can be scheduled around this important meeting.

Susan, please hold Thursday morning open.

Steve. I got a copy of our board agenda for Wednesday and we will be discussing consolidation beginning at 6PM not 7 as I had advised Matt.

Bob

From: Steve Hunnewell [mailto:shunnewell@sad11.k12.me.us]
Sent: Saturday, August 18, 2007 3:16 PM
To: English, Robert
Cc: RGordon13@RoadRunner.com; Joline Lacoste; kparadee@sad11.k12.me.us; mshea@sad11.k12.me.us; bfles@sad11.k12.me.us; Paul Knowles; Dick Rogers; susan.hodgdon@schoolunion44.org
Subject: Re: Consolidation Committee Schedule

Hi Bob, Bob, Joline and Susan,
I know Bob and Matt have talked, so I apologize for repeating below any stuff you already know, but I just want to make sure we're all aware of what is happening.
As you know, Thursday our Board voted to create a Consolidation Committee, of which I am a member, along with fellow Board members Kathy Paradee, Becky Fles, Matt Shea, and reps from our various Towns (so far Gardiner Mayor Andy MacLean and West Gardiner Selectman Greg Couture). Below is an email I sent out to the Committee and to our Board and Paul regarding the work that lies ahead of us. As you can see, we have several important meetings next week. In my discussions with DOE, I have been told our joint financial analysis will be in our hands and yours on Monday morning, which is a pleasant surprise to all of us. I understand from talking to Matt that you guys would like to meet Thursday during the day. After our Committee meets Monday we will be in touch with a specific time that hopefully works for you as well as us. We need to come to some kind of conclusion/agreement about what we will or won't do together.
We will have one or more of our Committee reps at the Wales Committee meeting on Wednesday night. See you soon!

Recent News

According to Harry Pringle, Litchfield by law cannot separate from Union 44 so it looks like that option is out. August 31 deadline, according to Norm Higgins at DOE, will likely be "a little flexible"

New Committee Members

Gardiner - Andy MacLean (Mayor)

West Gardiner - Greg Couture (selectman)

Pittston - Left message on machine for Ted Sparrow (selectman)

Randolph - Left message with Town (no response yet, will try calling Pete C directly today)

(All new members were given the Consolidation packet and asked to read it and have questions ready for Monday)

Schedule (as previously stated, all Board members are welcome to attend all meetings)

Monday

-Financial Analysis expected back from the State in the morning (according to DOE)

-First meeting of our Committee with Town members attending, 5pm at Supt Office

 Brief new members

 Assemble all Questions from weekend reading

 Discuss need for future meetings with potential partners.

 Decide whether we want to ask for a State Facilitator to help us.

 Decide who will attend future Union 44/Augusta/Chelsea Board meetings.

-Lisbon and Union 44 meet to discuss consolidation.

Tuesday

-Committee meets with Paul and Andrea to discuss Financial Analysis Results at 12:30pm.

-Immediately following that meeting, Committee conference call with Suzan Beaudoin (DOE) to ask any questions we have about the Finance Data.

-Frank Boynton asked if he could attend this meeting as well, and the answer was 'yes'.

Wednesday

-Tentative Committee meeting in Augusta with Norm Higgins and/or Ray Poilin (DOE) to answer questions assembled at Monday's meeting, 1pm.

-Augusta Public Forum at 7pm at CATC immediately followed by their Board meeting (we will send reps). They have told us they will NOT be making any decisions that night.

-Wales School Committee meets (we will send reps).

Thursday

-Union 44 and Chelsea/Whitefield want to meet with us again (Union 44 prefers morning or afternoon meeting).

-Waiting for a call back from Augusta to see if they can meet Thursday as well.

Week of August 27

-Augusta has tentatively scheduled a consolidation vote for sometime that week.

-August 29, Union 44 Board votes on consolidation.

-August 30 SAD 11 Board votes on consolidation.

Thank you to Becky Kathy and Matt for all your hard work yesterday making all of the above happen, and to Paul and Andrea for everything they've been doing all along.

Lisbon

Murdy
Shannon
Kob
Gab

- Food Service
Technology
Transportation/Bldgs/Plants
Business mg.
Curric. Coord

Over EPS - town supports education
co-curricular and extra curricular

176(S), 154(-) - 8 professional days

1400 students

Spang Program (Grades 3-12)

FL (Present) - Elem Reg. Lang. Study (7-12) ^{Span} French

3 Credits of Lang. for grad. = full years
HS - semester

Video conferencing lab

Guidance - 2 HS, 2 E, 1 MS

MS = 6/7/8

2 SROs - 1 Elem; 1 HS/MS

2 SW = Elem; HS/MS

HS - 450 students
Pres/AP/Co-Curric Liaison

AP: 5 courses

HS - 2 Art

Full day K

Budget - update to be reviewed. 100% to State Police

K-5: 2004

6-5: 1970's - exc.

HS: Needs per notation - 1955; 1962-3; 1970

Improving Sub. District

Governance

Hodgdon, Susan

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Sent: Saturday, August 18, 2007 3:16 PM
To: English, Robert
Cc: RGordon13@RoadRunner.com; Joline Lacoste; kparadee@sad11.k12.me.us; mshea@sad11.k12.me.us; bfles@sad11.k12.me.us; Paul Knowles; Dick Rogers; Hodgdon, Susan
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 - Brief new members
 - Assemble all Questions from weekend reading
 - Discuss need for future meetings with potential partners.
 - Decide whether we want to ask for a State Facilitator to help us.
 - Decide who will attend future Union 44/Augusta/Chelsea Board meetings.
- Lisbon and Union 44 meet to discuss consolidation.

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- Wales School Committee meets (we will send reps).

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Week of August 27

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- August 29, Union 44 Board votes on consolidation.
- August 30 SAD 11 Board votes on consolidation.

Thank you to Becky Kathy and Matt for all your hard work yesterday making all of the above happen, and to Paul and Andrea for everything they've been doing all along.

8/1/07

(W) 624-6638

(C) 343-1068

Jennifer Potter

conversation w/ Norm Higgins

1. By July 1, 2009 - must be either a
men-sch dist or
an PSU.
2. Gov^{ty} Approp. Cnte, Legisl. convinced that
districts are not doing due diligence and
don't intend to file NOI. Leaving ^{hard} on
Commissioner/DOE.
3. He'd suggest that we file a Reorgan.
Plan, not an Alternative Plan, Come Dec.
Changing the governance (SC) = reorg.
4. He's not sure of the criteria they'll
use to analyze the Reorg Plan -
will have to develop this. Right now,
it's changing daily.
5. We will stand out as being under
1500.
6. Discussed our due diligence/ results:
SAD 52 - no ~~Thornmouth~~ - no Lewis - no →

SAD 11 - talks to Lisbon - need financing
Richmond - we are interested; are they? Une

7. I mentioned our plan to hold a public session week of Aug. 20th
8. He thinks it will come down to 79-82 districts.
9. Spoke abt this morning's informational letter (#5)

School Union 44 Reorganization Subcommittee

Meeting Minutes

July 6, 2007

Members Present: Bob English (Wales School Committee), Joline Lacoste (Sabattus School Committee), Rob Gordon (Litchfield School Committee), and Susan Hodgdon (Superintendent of Schools).

1. Discussion was held on the latest information provided on the Department of Education web site, as well as from the public meetings being held. The Superintendent provided Subcommittee members with copies of a letter soliciting community involvement on the Reorganization Planning Committee(s) prepared by Bob English, the Guidelines information from the DOE passed out at the June 25th Commissioner's Conference in Bar Harbor, and the Reorganization Data Request Form for 2007-08 Financial Analysis (including copies of preliminary work from Lisbon School Department). Superintendent Hodgdon also read a letter she had received from Paul Knowles, Superintendent of MSAD #11.
2. The Subcommittee then considered a list of all school administrative units who neighbor School Union 44 to analyze and determine potential partners for reorganization. Those SAUs considered included: Lisbon (1411 students), Richmond (582 students), Monmouth (800 students), MSAD 75 (2450 students), MSAD 11 (2300 students), MSAD 52 (2166 students), Lewiston (4700 students), and, in the event of failure to partner, School Union 44 (1600 students). It was noted that the Reorganization Subcommittee met with the Board of MSAD 52 on May 10, 2007, and that the result was that MSAD 52 declined to join with Union 44 as a result of that meeting. Lewiston's student enrollment numbers would put the new RSU well above the recommended numbers, so the Subcommittee ruled out this as a viable partnership.
3. It was agreed that the Superintendent would send letters of invitation for exploration to Lisbon, Richmond, and Monmouth, and that she would respond to MSAD 11's invitation to discuss possible consolidation. These letters will be mailed out by 7/10/07. The Subcommittee would like to see the letter prior to mailing.
4. It was also agreed that it was necessary to do a solicitation of community member interest in serving on the Reorganization Planning committee by sending a letter to all households in Litchfield, Sabattus, and Wales early in the coming week.
5. The Subcommittee agreed to meet on July 20, 2007, at 3:00 p.m. at the Superintendent's Office.

Minutes by: Susan E. Hodgdon

SCHOOL UNION 44
and
OAK HILL COMMUNITY SCHOOL DISTRICT

LITCHFIELD • SABATTUS • WALES

SUSAN E. HODGDON
SUPERINTENDENT OF SCHOOLS

CATHY Y. MCCUE
ASSISTANT SUPERINTENDENT OF SCHOOLS

DR. WILL H. BURROW
DIRECTOR OF SPECIAL EDUCATION

KARLA R. MILLER
BUSINESS MANAGER

OFFICE OF THE SUPERINTENDENT OF SCHOOLS

971 GARDINER ROAD

WALES, MAINE

—

P.O. BOX 220

SABATTUS, MAINE 04280

SUPT. OFFICE 207-375-4273

FAX 207-375-2522

SPECIAL ED. OFFICE 207-375-4507

FAX 207-375-2522

July 9, 2007

Mr. Steven Cottrell
Superintendent of Schools
Monmouth School Department
P.O. Box 460
Monmouth, ME 04259

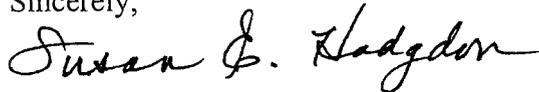
Dear Steve:

As you are aware, all school units having enrollments of less than 2,500 students must take steps to form regional school units with neighboring school systems in order to achieve this minimum school enrollment. In addition, school units must also achieve cost savings in the key areas of Central Office Administration, Special Education, Transportation, and Plant Operations.

In response to the above legislative requirements, and because Union 44 does not meet the minimum enrollment standard, the School Committees in Union 44 have formed a Reorganization Sub-Committee, comprised of a School Committee representative from Litchfield, Sabattus, and Wales, to initiate conversations with neighboring districts. This group has asked me to send you this letter inviting you and your School Board representatives to join in a discussion to see if the consolidation of our school systems would be mutually beneficial.

Please contact me with some potential meeting dates, if you are interested in exploring this topic, or with a brief note to inform me that you do not wish to meet. I look forward to hearing from you.

Sincerely,



Susan E. Hodgdon
Superintendent of Schools

SHE:ljd

SCHOOL UNION 44
and
OAK HILL COMMUNITY SCHOOL DISTRICT

LITCHFIELD • SABATTUS • WALES

SUSAN E. HODGDON
SUPERINTENDENT OF SCHOOLS

CATHY Y. MCCUE
ASSISTANT SUPERINTENDENT OF SCHOOLS

DR. WILL H. BURROW
DIRECTOR OF SPECIAL EDUCATION

KARLA R. MILLER
BUSINESS MANAGER

OFFICE OF THE SUPERINTENDENT OF SCHOOLS

971 GARDINER ROAD

WALES, MAINE

—
P.O. Box 220

SABATTUS, MAINE 04280

SUPT. OFFICE 207-375-4273

FAX 207-375-2522

SPECIAL ED. OFFICE 207-375-4507

FAX 207-375-2522

July 9, 2007

Shannon L. Welsh, Ed.D.
Superintendent of Schools
School Union #30
4 Campus Street
Lisbon Falls, ME 04252

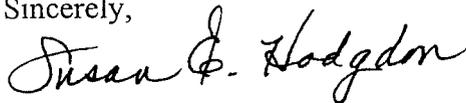
Dear Shannon:

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Sincerely,



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LITCHFIELD • SABATTUS • WALES

SUSAN E. HODGDON
SUPERINTENDENT OF SCHOOLS

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—
P.O. Box 220

SABATTUS, MAINE 04280

DR. WILL H. BURROW
DIRECTOR OF SPECIAL EDUCATION

KARLA R. MILLER
BUSINESS MANAGER

July 9, 2007

Ms. Martha Witham
Superintendent of Schools
Richmond School Department
132 Maine Street
P.O. Box 190
Richmond, ME 04357

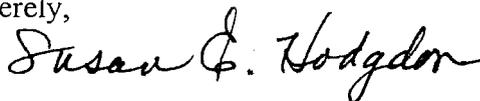
Dear Ms. Witham:

As you are aware, all school units having enrollments of less than 2,500 students must take steps to form regional school units with neighboring school systems in order to achieve this minimum school enrollment. In addition, school units must also achieve cost savings in the key areas of Central Office Administration, Special Education, Transportation, and Plant Operations.

In response to the above legislative requirements, and because Union 44 does not meet the minimum enrollment standard, the School Committees in Union 44 have formed a Reorganization Sub-Committee, comprised of a School Committee representative from Litchfield, Sabattus, and Wales, to initiate conversations with neighboring districts. This group has asked me to send you this letter inviting you and your School Board representatives to join in a discussion to see if the consolidation of our school systems would be mutually beneficial.

Please contact me with some potential meeting dates, if you are interested in exploring this topic, or with a brief note to inform me that you do not wish to meet. I look forward to hearing from you.

Sincerely,



Susan E. Hodgdon
Superintendent of Schools

MEMORANDUM

To: Litchfield School Committee
Sabattus School Committee
From: Wales School Committee
Date: July 10, 2007
Subject: School Administrative Consolidation

Dear Chairs Beaulieu and Clifford,

As you are aware, all school administrative units (SAUs) having enrollments of less than 2,500 students must take steps to form regional school units (RSUs) with neighboring school systems in order to achieve this minimum school enrollment. Since our SAUs have worked together as part of the Litchfield, Sabattus, and Wales CSD, we would like to invite you to consider the possibility of our three SAUs forming our own RSU. Together we can discuss options to join with other possible partners in the RSU formation, but we believe our three towns should continue our long relationship of educational partnership.

It is hoped that we all submit as part of our Notice of Intent filing, the intent that we three SAU, along with Litchfield, Sabattus, and Wales CSD will remain partners and intend on working together through the rest of the process, whether or not other SAU join us. We look forward to your affirmative response to this idea, and to begin the formation of the required Reorganization Planning Committee in the very near future.

Signed,

Robert English
Chair, Wales School Committee

MEMORANDUM

To: Wales School Committee
Sabattus School Committee
From: Litchfield School Committee
Date: July 10, 2007
Subject: School Administrative Consolidation

Dear Chairs English and Clifford,

As you are aware, all school administrative units (SAUs) having enrollments of less than 2,500 students must take steps to form regional school units (RSUs) with neighboring school systems in order to achieve this minimum school enrollment. Since our SAUs have worked together as part of the Litchfield, Sabattus, and Wales CSD, we would like to invite you to consider the possibility of our three SAUs forming our own RSU. Together we can discuss options to join with other possible partners in the RSU formation, but we believe our three towns should continue our long relationship of educational partnership.

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Signed,

Michael Beaulieu
Chair, Litchfield School Committee

MEMORANDUM

To: Litchfield School Committee
Wales School Committee
From: Sabattus School Committee
Date: July 10, 2007
Subject: School Administrative Consolidation

Dear Chairs Beaulieu and English,

As you are aware, all school administrative units (SAUs) having enrollments of less than 2,500 students must take steps to form regional school units (RSUs) with neighboring school systems in order to achieve this minimum school enrollment. Since our SAUs have worked together as part of the Litchfield, Sabattus, and Wales CSD, we would like to invite you to consider the possibility of our three SAUs forming our own RSU. Together we can discuss options to join with other possible partners in the RSU formation, but we believe our three towns should continue our long relationship of educational partnership.

It is hoped that we all submit as part of our Notice of Intent filing, the intent that we three SAU, along with Litchfield, Sabattus, and Wales CSD will remain partners and intend on working together through the rest of the process, whether or not other SAU join us. We look forward to your affirmative response to this idea, and to begin the formation of the required Reorganization Planning Committee in the very near future.

Signed,

Sheila Clifford
Chair, Sabattus School Committee

*School Union 44 School Reorganization Subcommittee
July 9, 2007*

Please read, consider, discuss, and step forward

Dear Litchfield, Sabattus, Wales Citizens:

The Wales, Sabattus, and Litchfield School Administrative Units are required, under recently passed legislation, to begin looking at possible consolidation of our School Administrative Units (SAUs) with others to form a single Regional School Unit (RSU) of at least 2,500 students (some exceptions may allow for a 1,200 student minimum). The legislation requires that the SAUs file Notices of Intent to reorganize by August 31, 2007. At that time, a Reorganization Planning Committee must be formed for each SAU and for the CSD, consisting of current School Board Member(s), Municipal Officer(s), and member(s) of the community.

In an effort to allow for timely formation of the Reorganization Planning Committee, the School Committee is soliciting names of members of each community who are interested in serving on this very important committee. This Committee will need to meet several times starting the first week of September (possibly before) through early December. There is the possibility that, if the planning process takes longer than November, the Committee will continue to meet into the spring of 2008 until a reorganization plan has been submitted and accepted by the Department of Education.

While clear guidance on these Reorganization Planning Committees has yet to be published, its stated purpose in the legislation is to submit a “. . .reorganization plan for consolidation into a regional school unit that meets the requirements. . .” of the school consolidation legislation. The legislation states some of the responsibilities of the committee by stating what must be included in the plan. It includes the following.

A. A reorganization plan must include:

- (1) The units of school administration to be included in the proposed reorganized regional school unit;
- (2) The size, composition and apportionment of the governing body;
- (3) The method of voting of the governing body;

- (4) The composition, powers and duties of any local school committees to be created;
- (5) The disposition of real and personal school property;
- (6) The disposition of existing school indebtedness and lease-purchase obligations if the parties elect not to use the provisions of section 1506 regarding the disposition of debt obligations;
- (7) The assignment of school personnel contract, school collective bargaining agreements and other school contractual obligations;
- (8) The disposition of existing school funds and existing financial obligations, including undesignated fund balances, trust funds, reserve funds and other funds appropriated for school purposes;
- (9) A transition plan that addresses the development of a budget for the first school year of the reorganized unit and interim personnel policies;
- (10) Documentation of public meeting or public meetings held to prepare or review the reorganization plan;
- (11) An explanation of how units that approve the reorganization plan will proceed if one or more of the proposed members of the regional school unit fail to approve the plan;
- (12) An estimate of the cost savings to be achieved by the formation of a regional school unit and how these savings will be achieved; and
- (13) Such other matters as the governing bodies of the school administrative units in existence on the effective date of this chapter may determine to be necessary.

If you are interested, or know someone who is interested, in serving on this extremely important **Reorganization Planning Committee** please let us know you wish to be considered for appointment. Just how members of the public will be selected, or how many, is still to be determined, but all who express an interest will be considered. It is important that all Committee members have Internet access and an email account for exchange of ideas and information between Committee members and the Department of Education facilitators who will work with us.

Please submit your written response to the School Union 44 School Reorganization Subcommittee by no later than July 31, 2007, at:

Wales School Committee, Bob English at: english999@aol.com
Litchfield School Committee, Rob Gordon at: RobertDGordon@fairpoint.net
Sabattus School Committee, Joline Lacoste at: JolineL@adelphia.net
Union 44 Superintendent, Susan.Hodgdon@schoolunion44.org or 375-4273

Maine School Administrative District #11

150 Highland Ave.
Gardiner, ME 04345
Phone: 207-582-5346
Fax: 207-582-8305
msad11.org

Paul D. Knowles, Ed. D
Superintendent

Virginia Rebar
Assistant Superintendent

June 21, 2007

Ms. Susan Hodgdon
Superintendent of Schools
Union #44
PO Box 220
Sabattus, ME 04280



Dear Susan:

As set forth in Public Law 2007, Chapter 240, all school units, which do not have a student population of 2,500 resident students, must aim to form regional school units with neighboring school systems which will achieve such a resident population, as well as, cost savings in Central Office Administration, Special Education, Transportation, and Plant Operations.

Since our school systems do not meet the above criteria and are neighbors with one another, please consider this letter an invitation to join the MSAD #11 School Board and me in a discussion to see if the joining of our two school systems would be beneficial and help both of our school systems move toward compiling with Public Law 2007.

If you are interested in such a discussion, please contact me at your earnest convenience to determine a date and time for such a meeting.

Yours In Education,

A handwritten signature in black ink that reads "Paul D. Knowles".

Paul D. Knowles, Ed.D
Superintendent

5/10/07

Topics for Consolidation Discussion with SAD 52

From SAD 52:

What is the general educational philosophy of the district?

Given that we are a Union, how do we approach equality/equity town to town?

What is our budgeting philosophy in relation to EPS?

What is our existing debt?

What is decision making like in Union 44? How are decisions made?

What are the qualities of an ideal consolidation partner? What would we hope they would bring to the table?

Conversely, what positives could we bring to enhance SAD 52?

What do we see overall management looking like if SAD 52 and Union 44 combined?

- Central Office management?
- The Board/School Committee?

Additional questions we would like discussed tomorrow night:

What kind of participation do they get at their meetings

Current cooperative expense savings

*Next June 13th mtg
6:00 to SAD 52.*

Hodgdon, Susan

From: English999@aol.com
Sent: Wednesday, November 28, 2007 9:16 PM
To: Hodgdon, Susan
Subject: Old emails

Sorry..... below is the set with a breakpoint between. I hope I can cut and paste ok.

This was to Lisbon's Chair

I thought I might get some information from you as to what you recommended last night on consolidation. Has the music stopped, or is there a dance or two left? If you could let me know it would be helpful in our discussions, and any presentation material that you could also provide would be appreciated for our documentation/information. My expectation was that the financial numbers were going to be to hard to get over. However, other benefits may have over come this problem.

Bob

Robert E. English

Steve,

Rob Gordon, another member of our sub-committee got this and forwarded to me. We are still interested in discussions and we discussed it last week at our Oak Hill board meeting. At that time it was stated that we are waiting on the financial numbers to come back from DOE as we (both you and us) need that information before going forward. I read the article in the KJ about Litchfield's meeting tomorrow and while it mentioned splitting, that is not a real desire of the Litchfield board members. They need to mention it since it would make more sense in some ways for Litchfield to go with you, and Sabattus with Lisbon (Wales just tags along – I'm the Wales rep so I can say that). We are still trying to look at all possibilities remaining. After today's KJ article on Monmouth going with Hall-Dale, Richmond, and Dresden our Monmouth/Richmond option(s) seem to be gone.

My personal concern with partnering with you is the student population of 4,000 and the complete loss of voting power (not that Wales is much now). Even Lisbon would dominate any new board. I see either combination as costing us in Union 44 more dollars, but we would have to spend more even if we could stay just us – we would need to increase our central office staff in a RSU configuration over what it is as a Union. But we got to do what we got to do.

I have inquired today on the status of the financial data coming back from DOE. Our staff is away yesterday and today having an off site leadership meeting. Don't throw us out just yet, we will be getting back in contact with you. My home email address is on this as well if you send to both I have best chance of getting it as soon as possible.

11/29/2007

Bob English

From: Rob Gordon [mailto:RGordon13@RoadRunner.com]
Sent: Tuesday, August 14, 2007 2:52 PM
To: English, Robert; 'Hodgdon, Susan'; 'Joline Lacoste'
Subject: FW: Consolidation

Bob,

I think he met to send this to you but got my email instead. I have NOT replied as I wasn't present. I also have not read the article that Litchfield is considering splitting off.

Rob

Robert Gordon

RGordon13@RoadRunner.com

From: Steve Hunnewell [mailto:shunnewell@sad11.k12.me.us]
Sent: Tuesday, August 14, 2007 1:02 PM
To: RGordon13@roadrunner.com
Subject: Consolidation

Hello Robert

This is Steve Hunnewell, Vice Chair of the MSAD 11 School Board, we met a couple weeks ago. Any progress on consolidation talks? I know we have interest in continuing discussions. I also read in the paper Litchfield may want to split from Sabattus and Wales, and we would certainly welcome talks with individual Towns as well, if they so wish. Let me know.

From: Prudence Grant [mailto:pgrant@gwi.net]
Sent: Monday, June 18, 2007 12:33 PM
To: English, Robert
Subject: Re: Union 44 and Lisbon

Good morning Bob,

11/29/2007

Thanks for your prompt reply. On Lisbon's behalf, I appreciate that you will keep the dance card space available for when everyone is truly ready to confer. I am impressed that you were able to get any response from your representatives since we were toally blown off by both Berube and Vaughn. Only John Nutting was open to conversation.

Have a great day.

Prudy

----- Original Message -----

From: English, Robert

To: Prudence Grant

Cc: Shannon Welsh ; Traci Austin ; Debra Danuski ; Janice Comber ; Robert English ; Joline Lacoste ; Rob Gordon

Sent: Monday, June 18, 2007 5:34 AM

Subject: RE: Union 44 and Lisbon

Prudence, thanks for the timely response. I to had been advised that concessions were agreed to during the Senate debate, but then when I talked to our local Representative she was unaware of any further agreements once it left the House. Anyway, beginning tonight more light shall begin to shine on this process. I'll keep an opening on our dance card for a possible future Foxtrot (or maybe a Polka as it may be a real lively dance).

I believe it would be beneficial for us to stay in contact, even if we rule out consolidation between us there will certainly be opportunities for collaboration in providing service or purchasing where we may be able to reduce our overall costs. Have a great day.

Bob

From: Prudence Grant [mailto:pgrant@gwi.net]

Sent: Sunday, June 17, 2007 1:22 PM

To: English, Robert

Cc: Shannon Welsh; Traci Austin; Debra Danuski; Janice Comber

Subject: Re: Union 44 and Lisbon

Good morning Robert,

Thanks for sending me you phone numbers and what you believed were your email addresses. In reality I believe I have only one email address, the business one.

I have shared with everyone on our end your invitation to dance. Because we are nowhere near ready to begin consolidation discussions since DOE is scheduled to provide us with print-outs that will only be given to superintendents and then we must spend some time analyzing them, and because we all need to understand the bill (I have read through it all but I'm told that there were changes made to it between 1 am and 3 am on the early morning that it passed in the House and we don't really yet know what they are (This sentence is getting pretty long!)), we are not yet ready to accept your invitation to dance.

One note: we do see our superintendent as a resource who has invaluable information that none of us School Committee members has or will get on our own.

So the end result is again a thanks for the invitation to dance; we all in Lisbon need to take some critical dance lessons before we can show up at the ball room (maybe that should read bawl room). Be assured that I'll be back in touch when our readiness is at an adequate level to make beginning dance steps possible. I truly doubt that we'll be getting to a full blown flamenco point (I've watched only a bit of DANCING WITH THE STARS).

Please feel free to be in touch even though we may not be ready to accept any dates.

Sincerely,

Prudy Grant

Lisbon School Comm. Chair

----- Original Message -----

From: [English, Robert](#)

To: pgrant@gwi.net

Cc: [Robert English](#)

Sent: Thursday, June 14, 2007 9:13 AM

Subject: Union 44 and Lisbon

Here are my email addresses. If you send to both I can see them at work and home.

Bob

Robert E. English

OK, that's Monday the 2nd, not the 3rd, and the only one we're missing is David Das.

Dave

----- Original Message -----

From: English999@aol.com

To: dgriff66@msn.com ; jrhandy@megalink.net ; bullard@megalink.net ; ddas@bates.edu

Sent: Sunday, March 25, 2007 1:35 PM

Subject: Purchasing - Monday April 3rd Meeting

5:30 on Monday the 3rd works for me. Pat's pizza will do nicely, but other venues ok too. I have school board meetings this week, Oak Hill High School budget meeting, and Wales Central School regular and budget meeting. I will mention that I'm joining a group of concerned persons to discuss possible consolidation of purchasing efforts.

Bob English

Greetings to all: This coming week looks like a problem for getting together. I think Betsy said she couldn't make it on Tuesday and Wednesday. I can still do 5 p.m. on Monday if that works for everyone else.

So how about the following week? The only problem for me might be April 3.

I really don't want to let this slide. As I think I said, I've got the high school committee and the Elm Street School Committee pretty warmed up about the idea.

Enjoy your weekend.

Dave

----- Original Message -----

From: English999@aol.com

To: dgriff66@msn.com ; jrhandy@megalink.net ; bullard@megalink.net

Cc: ddas@bates.edu

Sent: Thursday, March 22, 2007 9:15 PM

Subject: Re: Nutting call

11/29/2007

I would like to join you all to hear what's being thought about. I have school board meetings on Wednesday and Thursday beginning at 7pm (joy of being in a Union, I get to sit on three schools boards, three budgets, three of everything except superintendents - price we don't mind paying for local control). I have volunteer taxes normally on Mondays, but had no one last week, and none have scheduled for the 26th and if a late call comes in I can reschedule it. So I can join the group on either the 26th or 27th, and I can make 5pm meetings if necessary. I could do early on the 28th or 29th as long as I can make my school board budget meetings.

If you don't mind, since I see all your emails were sent during the day, please double address me so that I can see those sent during the work day in a timely manner. My work email is Robert.English@maine.gov. If things get to busy I may have to respond from home in the evening in order to not violate the State's policies on private use of email. However, it is permissible to use it for limited private purposes.

Bob English

Thanks, Bob. That sounds promising, and I'm very glad that John Nutting gave me your name a few weeks ago. Just to bring David Das up to date, we're all going to approach our operations directors (facilities directors, whatever you call them) and ask for five or six products or services that lend themselves to being purchased in bulk by a cooperative such as we've discussed before, and that Bob references from Betsy's experience below.

We also agreed that our board colleagues have encouraged us to keep following this path.

So let's talk by email again, perhaps early next week, to see what we've come up with.

How does that sound?

Thanks and regards,
Dave G.

----- Original Message -----

From: English999@aol.com

To: dgriff66@msn.com ; jrhandy@megalink.net ; bullard@megalink.net ; ddas@bates.edu

Sent: Monday, April 02, 2007 8:26 PM

Subject: Consolidated Purchasing

I know Betsy was going to provide the web address for WMEC, but I did some looking and found their web page. My search also pointed me to the article below that talked about this sort of collaboration as an option to the Governor's plan. By the way..... it looks like we all may be eligible to be members of WMEC as being in the Western Maine Superintendents region. Maybe we already have our vehicle?

I enjoyed our discussions and felt it was time well spent. Perhaps we need to look into why we do not belong to this collaborative already, and then if it seems well reasoned we should look to forming a separate group if that makes the best sense.

Bob

Check out AOL Money & Finance's list of the hottest products and top money wasters of 2007.

SCHOOL UNION 44

and

RECEIVED DEC 04 2007

OAK HILL COMMUNITY SCHOOL DISTRICT

LITCHFIELD • SABATTUS • WALES

SUSAN E. HODGDON
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DR. WILL H. BURROW
DIRECTOR OF SPECIAL EDUCATION

CHRISTOPHER R. TRENHOLM
BUSINESS MANAGER

To: Commissioner Susan Gendron
From: Litchfield, Sabattus, and Wales RPC
Date: 11/30/07
RE: Reorganization Plan Submittal

Enclosed, please find Union 44's Reorganization Plan Submittal Sheet, the Reorganization Plan Cover Sheet, and the Reorganization Plan reflecting work to date. In addition, there is a timeline detailing the work undertaken to meet the due diligence standard set forth by the Legislature, along with supporting, evidentiary documents. This is by no means an exhaustive compilation of the many, many discussions, phone calls, emails, planning sessions, and public discussions held since early Spring 2007, but it is a representation of the depth of the work in Union 44 to achieve the goal of school reorganization.

At present, with no viable partners committed to working with the four districts in Union 44, the Reorganization Plan we are submitting reflects the work to date to reorganize Union 44 into an RSU. We remain open and hopeful that a partnership will present itself as we observe the steps being taken by your office to remove the barriers and obstacles we have encountered along the way.