

April 9, 2025

Dear Mr. Stookey and complaint cosigners,

On February 18th, 2025 the UCFSD school board members received an email and printed document entitled "Formal Complaint Under Board Policy 906" Patton Middle School. In considering the entirety of your complaint, a comprehensive review was undertaken of board responsibilities and actions related to the project, which are governed by UCFSD policies, state regulations, and law. Relevant school board policies to your complaint can be found on the district website under Board Docs [<https://go.boarddocs.com/pa/uncf/Board.nsf/Public#>] (policies 002, 003, 006, 007, 011, 101, 103, 312, 601, 602, 603, 604, 605, 619, 701, 704, 901, 902, 903, 906, 910). Please accept the following as the response of the Unionville-Chadds Ford School District (UCFSD) Board of Directors surrounding your complaint.

### **The Middle School Building Project Process**

As part of UCFSD's strategic planning processes and discussions at the January, February, and March 2024 board meetings, the district decided to undertake a study of options for Charles F. Patton Middle School. A Feasibility Study Team was created and included a diverse group of stakeholders, including students, board members, teachers, central office administrators, building administrators and Marotta/Main Architects. The team met twice monthly to guide the process and discuss findings.

There were monthly updates at Board meetings starting in May, 2024. Community members had 38 opportunities to share their perspective during Board meeting Community Comments as well as at the Information Session and Community Conversation events.

The work completed by the Feasibility Team was comprehensive and shared publicly with the community as it was unfolding and after a recommendation was made. Community engagement and outreach was frequent and varied. Please see the detailed document entitled "Middle School Project Timeline and Community Outreach" attached to this letter and located on the Feasibility Study web page [[bit.ly/ucfsdmsfeasibilitystudy](http://bit.ly/ucfsdmsfeasibilitystudy)]. While this document is a comprehensive review of the organized activities of the process, it does not include the countless hours individual board members and administration spent investing in the Middle School decision making process.

The UCFSD Director of Finance is Mr. Joe Deady. He has an MBA and a Certificate in Education Finance (CEF) from Georgetown University. A CEF is an interdisciplinary certification program that combines finance, economics, and leadership with public policy and administration. More importantly, he has 22 years of school finance experience, including over two hundred million in bond offerings. As the School Board Treasurer, Mr. Deady has a fiduciary responsibility to the Board and community. He has a proven track record of estimating the district's 100+ million-dollar budget to within 2% annually. In his ten

years with the district, annual independent financial audits have all been unqualified clean audits with no findings.

For the Middle School Project, Mr. Deady worked with a team of experts at Public Financial Management (PFM) and Stifel Institutional in preparing initial financial estimates for a 120-million-dollar project. He widely consulted with local school districts on their recent large building projects, including Avon Grove, Upper Darby, Abington, and the CCIU.

Mr. Deady spoke with community members about the project, including Mr. Stookey. He explained the financial analysis and some of Mr. Stookey's suggestions were incorporated into presentations. While Mr. Stookey has an impressive educational and professional resume, he is not an expert in school finance and municipal bond offerings. The best practices for school finance are not the same as For-Profit organizations. Additionally, the laws covering municipal financing require that Mr. Deady only take financial advice from Municipal Advisory Firms, registered with the Securities and Exchange commission [[bit.ly/ThirdPartyInsight](https://bit.ly/ThirdPartyInsight)].

The following section contains responses that directly align with the format used in the complaint letter.

- A. Net present value estimates for all three design construction costs were calculated, though this is not the standard practice for school financial analyses. These include the *Maintain* option at \$67 million, *Renovate* at \$113 million and *Replace* at \$120 million. All information received by the district from the Feasibility study has been shared publicly.
- B. The district has never claimed that the middle school renovation is not going to cost money. The bond payoff schedule has been shared repeatedly and was used to explain the opportunity for new bond offerings for the Middle School construction project, while keeping the debt service amount relatively consistent. The estimated project costs and financial assumptions have been publicly shared.
- C. The board publicly discussed the pros and cons of delaying the project, the financial impact, and the intangible benefits and opportunity of a potential new building. There was no additional information sought for this phase of the project, so there was no need to delay the timeline.
- D. Debt restructuring decisions will be voting items for future boards. The specifics of a bond issuance (amount/timing/rate) will only be known as the project proceeds. This board addressed the topic of a referendum at multiple public board meetings. Board members are not interested in proceeding with a building project that would require tax increases above the allowable Act 1 amount, so a referendum is not needed. Community input was widely sought and received (see attached "Middle School Project Timeline and Community Outreach" document).
- E. School budgets are approved on an annual basis, as are tax rates. This year, the board passed a resolution to not exceed Act 1 and not apply for exemption funding. The makeup of the school board changes with elections. It is impossible to guarantee future board votes. It is this board's opinion that deciding to move forward with the construction process on a new middle school is avoiding financial and logistical problems for future boards. Act 1, officially known as the Taxpayer Relief Act, is a Pennsylvania law enacted in 2006 that significantly affects school

district taxation and budgeting. The primary purposes of Act 1 are to: 1) Provide property tax relief to homeowners 2) Control the rate of school property tax increases and 3) Create more transparency in school budgeting. The district is legally bound by this Act.

- F. The district engaged with trusted and highly qualified professionals at PFM and Stifel Industrial in estimating the financial impact and feasibility of the middle school projects. PFM is one of the nation's leading independent municipal finance advisors. The administration consulted with area superintendents and business managers about their building processes and experiences.
- G. After nine months of work by the Feasibility Study Team, district administration, and stakeholder input, the best option was determined. The recommendation to replace the middle school was shared by Dr. Sanville at the January 6th Special Board meeting. A benefit-driven recommendation was needed by the board to proceed with a costly project.
- H. The funds raised for the project will be done through bond issuances. These funds can only be used for capital projects. There are no plans to reduce the budget spending for educational programs. Strong financial management by the district over a long time has made this project possible without negatively impacting the educational mission of the district.
- I. The district remains committed to our core values. Value #1 is Educational Excellence: Delivering a top-tier educational program is the cornerstone of all that we do. Despite misleading claims of a *declining* or *failing* school district, UCFSD has top-tier teachers, hard-working and accomplished students, and excellent educational and professional outcomes.

The laws of Pennsylvania grant broad powers to local school boards in school construction matters. As the body democratically elected to govern a school district, the school board determines which construction projects to undertake, when to proceed with the projects, and how to pay for the projects. Citizens can influence the work of a school district by attending and speaking at school board meetings, volunteering for committees, participating in information sessions, submitting complaints, and voting in elections.

The board recognizes that there are community members who would have liked more or different community outreach, more or different community engagement, more or different outside financial consultation, more or different feasibility team members or partners, and a different timeline. In reviewing the complaint in light of the entirety of the Middle School Project process thus far, the Board finds that the district administration and the School Board have appropriately and responsibly sought community engagement, provided project oversight, and reviewed the comprehensive data gathered.

### **Complaints against Administration**

The board is fully aware of media stories regarding Dr. Sanville and alleged complaints against him, other administrators, and our solicitor. The educator misconduct process legally requires confidentiality and it is a violation of the law to divulge information before findings have been delivered. The board correctly will not comment.

The board stands by the Distinguished annual performance ratings of Dr. Sanville for each of the past 13 years. Dr. Sanville has demonstrated ethical behavior, strategic thinking, kindness, and care for the student body and staff of UCFSD. He is the second longest tenured superintendent in the state, a

leader among the Chester County Superintendents, a past runner up for PA Superintendent of the year, and past president of Pennsylvania Association of School Administrators. He is of the highest moral character and behavior.

**Complaint about updating Board Policy 906 "Public Complaints"**

As required by the Pennsylvania School Code, public school districts are governed by a School Board, who, in compliance with state and federal laws, establish policies and regulations by which their schools are governed. UCFSD school policies can be found on the district website under Board Docs. At each monthly public meeting, the Board Policy Committee of the Whole considers established policies or creates new policies. It is standard practice to review policies that have not been revised within five years. In November 2024, Policy 906 "Public Complaints" came up for review as it was last reviewed in April 2019. The original policy and the draft under consideration (under Policy Agenda for 2/21/25) can be found on the district website under Board Docs. Suggested edits for Policy 906 include clarifying complaint types and processes, adding specific time frames and identifying the responsible respondent which will increase transparency and accountability in the public complaint process. These improvements do not align with your complaint claims of changes "completely eliminating critical due process protections, such as the right of citizens to be heard or have their complaints addressed by a neutral fact finder in the District."

**Request for Records**

Board Policy 801 "Public Records" covers the process and purpose of the public access to district information, known as "Right to Know Requests." If seeking records, please follow Board Policy 801 and send a written request to UCFSD Open Records Officer, Mr. Joe Deady (email [jdeady@ucfsd.net](mailto:jdeady@ucfsd.net)).

**Conclusion**

We appreciate your engagement in the process and have thoroughly considered your complaint both in light of its content and the board's responsibilities, as indicated in UCFSD board policies and state law. This letter is the Final Level response of the 906 complaint process. No further action is required. Moving forward, the district will continue to share regular public updates about the Middle School Project and follow all required and transparent rules around bids, bond offerings, annual budgets and taxation.

Sincerely,

Rashi Akki	Mary Kate Loomis
Jody Allen	Brian Schartz
Elise Anderson	Steve Simonson
Victoria Baratta	Erin Talbert
Jeff Hellrung	



## **Middle School Project Timeline and Community Outreach**

### ***Phase 1: Vote to Conduct Feasibility Study***

- April 22, 2024: Board Communication
- April 22: Administration Communication
- April 25: CFPMS Faculty Meeting
- April 29: Call with CFPMS PTO President
- April 30: Curriculum Committee Meeting
- April 30: PTO Advisory Committee Meeting
- May 1: CFES PTO Meeting
- May 2: UES PTO Meeting
- **May 13: Board Work Session Discussion and Community Comments Opportunities (2x)**
- May 16: CFPMS PTO Meeting
- May 17: HES PTO Meeting
- May 20: UHS PTO Meeting
- **May 20: Board Meeting Discussion and Community Comments Opportunities (2x)**
- May/June: PES PTO Meeting (no May or June meeting scheduled)
- **June 10: Board Work Session Discussion (2x)**
- June 13: Longwood Rotary State of UCFSD Meeting
- **June 17: Board Meeting Vote on Conducting Feasibility Study and Community Comments Opportunities (2x)**

### ***Phase 2: Feasibility Study***

- **July 15: Board Meeting Community Comments Opportunities (2x)**
- July 23: Feasibility Study Kickoff Meeting with Marotta/Main
- **August 12: Board Work Session Community Comments Opportunities (2x)**
- **August 19: Board Meeting Community Comments Opportunities (2x)**
- August 20: Feasibility Study Committee Meeting
- August 23: Dedicated Email Address Created (msfeasibilitystudy@ucfsd.net)
- August 23: Landing Page Created
- August 23: Superintendent's Video with Invitation to Virtual Information Session
- August 27: Social Media Posts with Invitation to Virtual Information Session
- August 27: Secondary Student, Staff, Family & Community Emails with Invitation to Virtual Information Session
- August 30: Social Post reminder to register for info session
- September 3: Secondary Student, Staff, Family & Community Emails with Info Session Reminder
- September 3: Feasibility Study Committee Meeting

- **September 3: Virtual Information Session With Moderated Q&A**
- September 4: Update Landing Page with Information Session Video and Frequently Asked Questions
- September 5: Social Post notification of info session recording on microsite
- **September 9: Board Work Session Community Comments Opportunities (2x)**
- **September 16: Board Meeting Community Comments Opportunities (2x)**
- September 17: Feasibility Study Committee Meeting
- September 25: Press Release with Invitation to Community Conversation One
- September 25: Social Media Posts with Invitation to Community Conversation One
- September 25: Secondary Student, Staff, Family & Community Emails with Invitation to Community Conversation One
- September 30: CFPMS Staff Community Conversations during School Day
- October 1: Feasibility Study Committee Meeting
- October 2: Social Media Posts with Reminder to Attend Community Conversation One
- October 8: Social Media Post with Reminder to Attend Community Conversation One
- October 8: Secondary Student, Staff, Family & Community Emails with Reminder to Attend Community Conversation One
- October 9: UCFSD Administrator Community Conversation at Cabinet
- **October 9: Community Conversation One (With Tours)**
- October 10: Social Media Post with Community Conversation One Thank You
- **October 14: Board Work Session Community Comments Opportunities (2x)**
- October 15: Feasibility Study Committee Meeting
- October 16: Update Landing Page with Community Survey Link
- October 16: Secondary Student, Staff, Family & Community Emails with Invitation to Complete Community Survey
- October 20: Social Media Posts with Invitation to Complete Community Survey
- **October 21: Board Meeting Community Comments Opportunities (2x)**
- October 29: Feasibility Study Committee Meeting
- November 10: Greet Unionville-Chadds Ford Magazine Ad for Community Conversation Two Lands
- **November 11: Board Work Session Community Comments Opportunities (2x)**
- November 12: Feasibility Study Committee Meeting
- **November 18: Board Meeting Community Comments Opportunities (2x)**
- November 26: Feasibility Study Committee Meeting
- December 2: Press Release with Invitation to Community Conversation Two
- December 2: Social Media Posts with Invitation to Community Conversation Two
- December 2: Secondary Student, Staff, Family & Community Emails with Invitation to Community Conversation Two
- **December 2: Board Meeting Community Comments Opportunities (2x)**
- December 6: Update Landing Page with Draft Presentation
- December 6: Secondary Student, Staff, Family & Community Emails with Reminder to Attend Community Conversation Two and Draft Presentation
- December 7: Social Media Posts with Reminder to Attend Community Conversation Two and Draft Presentation

- **December 9: Community Conversation Two**
- December 10: Social Media Post Thanking Community Conversation Two Participants and Reiterating Availability of Microsite
- December 10: Feasibility Study Committee Meeting
- December: Update Landing Page with FAQ from Community Conversation Two
- January 2: Press Release with Link to Updated FAQ and Invitation to Attend Special Board Meeting
- January 2: Social Media Posts with Link to Updated FAQ and Invitation to Attend Special Board Meeting
- January 2: Secondary Student, Staff, Family & Community Emails with Link to Updated FAQ and Invitation to Attend Special Board Meeting
- January 5: Ad in Publication of Record (West Chester Daily Local News) for Special Board Meeting
- January 6: Social Media Posts with Link to Updated FAQ and Invitation to Attend Special Board Meeting
- January 6: Secondary Student, Staff, Family & Community Emails with Link to Updated FAQ and Invitation to Attend Special Board Meeting
- January 6: Feasibility Study Report & Recommendation CFPMS Staff Meeting
- **January 6: Feasibility Study Report & Recommendation Special Meeting and Community Comment Opportunities (2x)**
- January 7: Update Landing Page with Recommendation
- January 7: Press Release with Recommendation
- January 7: Social Media Posts with Recommendation
- January 7: Secondary Student, Staff, Family & Community Emails with Recommendation
- **January 13: Board Work Session Community Comments Opportunities (2x)**
- **January 21: Board Meeting Feasibility Study Report & Recommendation Discussion and Community Comments Opportunities (2x)**
- January 23: Update Landing Page with FAQs
- **February 10: Board Work Session Feasibility Study Report & Recommendation Discussion and Community Comments Opportunities (2x)**
- February 10: Greet Unionville-Chadds Ford Magazine Ad for Board Meeting Vote Lands
- February 14: Letter to the Community re: Financial FAQs & Update Landing Page
- **February 18: Board Meeting Feasibility Study Report & Recommendation Vote and Community Comments Opportunities (2x)**
- February 19: Board President Letter to Staff, Families & Community (School Messenger)
- February 19: Update Landing Page with Vote