

Reorganization Feasibility
Study
On Behalf of the



Kinderhook (Ichabod Crane)
and
Schodack



Central School Districts

April, 2012

Prepared by:
The SES Study Team, LLC.

FINDINGS OF THE STUDY

*This report was prepared with funds provided by the New York State
Department of State under the local government efficiency grant program.*

*Ichabod Crane and Schodack
Central School Districts*

Objectives of the school districts:

To seek reductions in the ongoing cost of school operations while maintaining or enhancing the educational opportunities for students by assessing the current instructional and non-instructional programs of each school district to determine the specific economic efficiencies to be achieved and,

To report to the members of the two school boards, the school staffs, and the residents of the communities on specific actions that should be considered as they move to implement reorganization of the two school districts.

**Purpose of the Study Funded by the NYS
Department of State:**

To research if the reorganization (through centralization) of the two districts can provide enhanced educational opportunities and, at the same time, increase efficiencies and lower cost for the overall operations by forming a reorganized school district.

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School District Community Advisory Committee Members Appointed by the Respective Boards of Education to Work with and Advise the SES Study Team in the Preparation of the Feasibility Study

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Lori Creeron	Support Staff Member/Resident	Program
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Patty Westover	Faculty member/Resident	Program
Rachel Stead	Community Member	Support
Susan Ramos	Community Member	Finance
Tamara Proniske	Retiree	Finance
Veronica Mangione	Community Member	Finance
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The Boards of Education, the Superintendents, and the SES Study Team sincerely thank the volunteer Joint Community Advisory Committee Members for their time, diligence, collaboration and advice in the preparation of this study.

The SES Study Team acknowledges and thanks Suzanne Spear and Jay O'Connor of the State Education Department and Carl Ublacker of the Department of State as helpful collaborative resources for the study.

Preface

Ichabod Crane Central School District

Board of Education Members: John Antalek; John Chandler; Andrew Kramarchyk (past-president); Bruce Naramore; Thomas Neufeld; Susan Ramos; Regina Rose (president); Anthony Welcome

Superintendent of Schools: Lee A Bordick, Interim

Ichabod Crane Central School District is located primarily in northern Columbia County. Two villages, Kinderhook and Valatie form the hub of the district. The District of approximately 100 square miles was formed in 1954 by the joining of these village schools. Today the Ichabod Crane school district has approximately 1900 students who are housed in a high school (approximately 650 students in grades 9-12) a middle school (approximately 420 students in grades 6-8) and two elementary schools (approximately 830 students in grades K-5).

The Ichabod Crane Central School District employs 220 professional staff and 140 support staff. It is governed by a nine-member board of education. The District is managed by three district level administrators; five building level administrators and three support supervisors. The operating budget at the time the study commenced was approximately \$38.5 million.

Schodack Central School District

Board of Education Members: Michael Charsky; Christine DiGiulio; Andrew Fleck (president); Michael Hiser; Lisa Lafferty; Paul Puccio; Bruce Romanchak; George Warner; Mary Yurista

Superintendent of Schools: Robert Horan

The Schodack Central School District is located primarily in Rensselaer County. The village of Castleton-on-Hudson forms the hub of the district. The District of approximately 35 square miles was formed in the late 1940's by the joining of several smaller schools and the village school district. Today the Schodack Central School District has approximately 1015 students who are housed in the Maple Hill High School (approximately 365 students in grades 9-12), the Maple Hill Middle School (approximately 300 students in grades 5-8) and the Castleton Elementary School (approximately 350 students in grades K-4).

The Schodack Central School District employs 120 professional staff and 102 support staff. The District is managed by three district level administrators, three building principals and 2 support supervisors. The operating budget at the time the study commenced was approximately \$21.4 million.

INTRODUCTION

A MATTER OF THE ECONOMY AND NOT POOR STEWARDSHIP OF PUBLIC RESOURCES

The Ichabod Crane and Schodack Central School officials have been concerned about the financial resources available to support a quality educational program for their students. These districts, like many in New York State (as well as individuals and businesses) have had to reduce expenditures for staff, programs, and general operations to deal with the recession of 2008 and its continued fallout for the foreseeable future.

With state aid revenues likely to remain ‘flat’ or slightly increasing for some districts, it is projected that school district expenditure reductions will need to continue in order to offset these flat or declining revenues. It is believed by the Boards of Education of the two school districts that local community members are unable to shoulder the burden of a transfer of the shortfall in state aid revenues to increased property taxes to raise the revenue.

In addition, with the passage of the 2% property tax levy limit law by the NYS Legislature and Governor in June 2011, schools cannot go legislatively beyond that measure without over 60% of their voting residents agreeing to do so. For upstate school districts that typically receive 60+% of their revenues from state aid, it is becoming increasingly difficult to maintain even the most basic of school programs. Indeed, for both the short and long term, the financial forecast for many upstate school districts is not good.

THE DILEMMA FACING COMMUNITIES AND THEIR RESPECTIVE BOARDS OF EDUCATION

1. State aid to support local school districts may stay close to flat for the foreseeable future;
And,
2. The capacity for local taxpayers of a school district to shoulder more revenue responsibility through property taxes may or may not be possible;
And,
3. School district communities, the State of New York, and the Federal perspective are expecting higher measured student achievement for all students;
And,
4. School district communities, the State of New York, and the Federal perspective are requiring the delivery of an educational program to all students that will enable them to be productive citizens in the workforce, and to be competitive in the global economy, as well as have the basic skills to pursue post-high school specialized education opportunities.

EXAMPLES OF OTHER DEMOGRAPHIC VARIABLES AT WORK AFFECTING THE DELIVERY OF PUBLIC SCHOOL EDUCATION

- A. Declining community population and a declining school-age population, 2/3 of NYS population resides in 12 downstate counties;
- B. Declining job market opportunities;
- C. Growing federal budget deficit and sluggish economy;
- D. Rural NYS experiencing a 44% less growth in property values compared to metro areas of the State;
- E. Increasing health insurance and employee pension costs;
- F. Unemployment rate in rural NYS of about 10.5% is almost one fifth higher than the unemployment rate in metro areas of the State;

- G. Global threats to the US economy by increases in international student measured achievement;
- H. Unfunded mandates expected of school districts;
- I. Equity issues in how school funding by the state affects less wealthy school districts.

DUE DILIGENT PLANNING BY THE ICHABOD CRANE AND SCHODACK BOARDS OF EDUCATION AND THIS STUDY

The two Boards of Education collaboratively applied for and were awarded a NYS Department of State Grant to determine if reorganization could provide enhanced opportunities for all pupils of the two school districts and, at the same time, increase efficiencies and lower cost for the overall operations by forming a reorganized school district.

The two Boards of Education and their superintendents had no pre-conceived notions about the findings of the study or a pre-conceived advocacy for what the findings should be.

They believe they can work together to deliver the program and deal with the long-term financial reality facing school districts, other municipalities, and local school district residents. In addition, the Boards recognize that the financial projections and economic projections underscore that previously successful ways and decisions about serving pupils *may not* be viable solutions in ‘this new normal’ caused by economic conditions facing our region, the state and the nation.

Because of the due diligence of the two Boards of Education in exploring options, the information offered in this study provides a concrete way for the two communities and their Boards of Education to engage public discussion in an open and transparent fashion. The SES Study Team ‘holds up a mirror’ in the study to various kinds of data about the two school districts; organizes that data into useable resource tools; and reports the findings of the analyses of the data without bias or advocacy as to what decision the Boards and communities should implement.

We hope our work in collaboration with 30 volunteer community members from the two school districts will be a valuable tool to help local decision-making deal with the dilemma facing public schools in an economy that likely will not provide increased financial support to deliver Pre-K through grade 12 public education.

We thank the districts for allowing us to work with you and the Community Advisory Joint Committee on this study.

The SES Study Team, LLC
Spring, 2012

Please note:

If the communities choose to approve a reorganization of both districts into one, the reorganization would begin on July 1, 2013—a complete school year from the current school year. Since staffing and financial data do not exist for the school year 2012-2013 at the time of the study, all staffing and financial data used in the study are benchmarked to the school year 2011-2012. Therefore, estimated numbers in the study may change once 2012-2013 staffing and finance data are established by Ichabod Crane and Schodack Central School Districts.

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- *What Questions Should the Community Advisory Joint Committee and the Two District Reorganization Study Address/Answer?* -2-
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FINDINGS OF THE STUDY

PURPOSE OF THE STUDY

The Boards of Education of Ichabod Crane and Schodack Central School Districts engaged this study as part of their on-going long-range planning efforts. The two Boards, similar to most school districts in New York State, continuously balance the mission to provide a comprehensive educational program as a foundation that will enable students to be ‘globally competitive’ as adult citizens, and the responsibility to provide such a program within the financial means of the communities that the school districts serve.

The New York State Department of State provided a grant opportunity for the two school districts to study the *feasibility* of reorganization of the districts as a possible method to deliver educational services collectively to the adjoining school districts and communities.

The two districts accepted the grant with no preconceived conclusions as to what the findings of the study might be. The two Boards of Education and their superintendents sought the grant as a resource to exercise their *due diligence* in providing information about a possible option for delivery of public education by the two districts for review and possible consideration by the respective communities.

The services of the SES Study Team, LLC were engaged by the two Boards of Education to implement a feasibility study to answer the question required to be addressed by the NYS Department of State grant:

“Would a reorganization of the Ichabod Crane and Schodack Central School Districts provide enhanced educational opportunities and at the same time increase efficiencies and lower costs for the overall operation by forming one centralized district?”

The role of the SES Study Team is to prepare a study that provides practical, useful data to help the Boards of Education, the Community Advisory Joint Committee, and the communities to first engage in a public policy discussion as to how best to serve the young people of the communities in the future and, then, second to make decisions about that future. The study also provides information to the Commissioner of Education.

METHODOLOGY OF THE STUDY

- ✓ Guiding values and principles of the study process included:
 1. Inclusion of, and sensitivity to, all points of view from the communities involved;
 2. A focus on answering a set of questions by school district and community stakeholders;
 3. An approach that begins with the collection of data, a review of major findings, sharing of perceptions, recommendations based upon challenges and opportunities, and finally modeling of potential options as a result of reorganization;

FINDINGS OF THE STUDY

4. The role of school district instructional, instructional support, and administrative staff in providing comprehensive data for the study to use to answer its questions;
 5. Public transparency of the work and data developed and compiled by Community Joint Committee and the Study Team;
 6. The creation of a study report that becomes the prime useable tool by members of the communities as they decide how best to educate their children in the future.
- ✓ The key element of the methodology of the study is the Community Advisory Joint Committee. Thirty community members from the two school districts met eleven times from May 2011 through January 2012 with the consultant team. The purpose of the Community Advisory Joint Committee is to provide representation for all residents, taxpayers and stakeholders of each respective district in the study process. The charge given to the committee members respectively appointed by each Board was:
- ◇ To listen to presentations and discussions and provide perspectives and feedback about the data and their analysis during the study process.
 - ◇ To advise the consultants on issues related to the study.
 - ◇ To help keep district residents informed with accurate information about the study.
 - ◇ To promote 3-way communication among school district officials and personnel, the citizens of the districts, and the SES Study Team consultants.

Starting on page -1- of the **DATA** section of the study report are the criteria used by the Boards to appoint Committee members from those who volunteered.

- ✓ The Community Advisory Joint Committee first identified a set of questions that their work and the study should address. These questions became the guide for the research of the study and the agendas of the work sessions of the Advisory Joint Committee.

Starting on page -2- of the **DATA** section of the study report are the questions developed by the Joint Committee to guide the work of the study.

- ✓ The Community Advisory Joint Committee met with the SES Study Team for eleven work sessions from May 2011 through January 2012. Data sets were collected, analyzed, and discussed by the Joint Community Advisory Committee and the SES Study Team to address the purpose of the study:

Would a reorganization of the Ichabod Crane and Schodack Central School Districts provide enhanced educational opportunities and at the same time increase efficiencies and lower costs for the overall operation by forming one centralized district?

The role of The SES Study Team was to “hold up a mirror” to data about each of the school districts; organize the data without analysis; provide the data to the Community Advisory Joint Committee in an unbiased manner; answer questions of the community volunteers; listen to the perceptions about what are the possible *opportunities and challenges* if the communities of the two school districts chose to reorganize into one school district. The data included information about the following major categories:

- ◇ Demographics of the two districts.
- ◇ The current ‘fiscal condition profiles’ of each district.
- ◇ Current property taxes.
- ◇ Pupil capacities of the existing school buildings.
- ◇ Building conditions of the existing school buildings.
- ◇ Current class sizes in delivering the program currently.
- ◇ The elementary program offerings.

FINDINGS OF THE STUDY

- ◇ The secondary program offerings.
- ◇ Co-curricular and athletic offerings.
- ◇ State student assessment data.
- ◇ College enrollment data about school district graduates.
- ◇ How the school districts currently share regionally with other school districts.
- ◇ Current instructional and instructional support staffing and deployment.
- ◇ Current expenditures for staffing and program.
- ◇ Elements of current labor contracts.
- ◇ Historical retention pattern of staff.
- ◇ Current expenditures to deliver the educational program separately in the two districts.

The agendas for each of the work session meetings of the Community Advisory Joint Committee are included starting on page -6- of the **DATA** section of the study report

FINDINGS OF THE RESEARCH AND ANALYSIS OF DATA ABOUT EACH SCHOOL DISTRICT

A. Demographics of the Two School Districts

1. Estimated Enrollment Projections of the two school districts.

The six sources of current and projected school district enrollment are:

- live births within the school district and their eventual kindergarten enrollment in the district;
- new household population with children who move to the district;
- new population who move to the district who are at child-bearing age and plan to begin a family;
- enrollment of students from non-public schools or from home schooling settings;
- school program and academic intervention changes that may increase the success of the school district in keeping existing enrollment as long as possible to culminate in high school graduation;
- a change by other public schools, if any, who tuition students to attend the school district.

All enrollment projections have inherent uncertainties because the assumptions on which they are based can be affected by changes in human behavior, by the economy, or by other events. Key factors of population change relating to school enrollments are often interrelated and can multiply as one or more factors unexpectedly change or change significantly from their status at the time of this study. Future enrollments are positively affected by:

- Added births in the district and the resulting added kindergarten enrollments.
- The reductions in private school/home school/charter school enrollments
- The increase in the enrollment retention of students through grade 12 as completers of a diploma program.
- A robust employment market that can attract new residents with children and/or who are at childbearing age.
- A robust housing market that can attract new residents with children and/ or who are at childbearing age.
- Increased enrollment of tuitioned students from other school districts.

FINDINGS OF THE STUDY

Similarly, future enrollment projections can be negatively affected by the antitheses of the same variables. Therefore, the enrollment projection estimates should be revisited and updated yearly if there are any major changes in: the assumptions that base the methodology of this study; the annual live birth data for the district; major shifts in the housing market and employment market opportunities from what has been expected; changes in the educational program offered; and/or changes in the non-public school, charter school, or out of school district enrollments by school district residents; or major immediate changes to the numbers of pupils tuitioned from other school districts.

The enrollment projections calculation study data tool is in the **DATA** section of the study report starting on page -32-.

The baseline cohort enrollment projections for the two districts five years into the future for grades K-6 and ten years into the future for grades 7-12 are charted below.

<i>DATA SNAPSHOT ICHABOD CRANE CS</i>			
Calculation	Year	Grades K-6	Grades 7-12
CURRENT ENROLLMENT	2010-2011	991	1036
January 2012 Enrollment	January 2012	950	936
Baseline Cohort Low Range	2015-2016	867	
	2020-2021		796
Baseline Cohort Mid Range	2015-2016	944	
	2020-2021		851
Baseline Cohort High Range	2015-2016	982	
	2020-2021		877

<i>DATA SNAPSHOT SCHODACK CS</i>			
Calculation	Year	Grades K-6	Grades 7-12
CURRENT ENROLLMENT	2010-2011	502	542
January 2012 Enrollment	January 2012	488	519
Baseline Cohort Low Range	2015-2016	433	
	2020-2021		371
Baseline Cohort Mid Range	2015-2016	440	
	2020-2021		392
Baseline Cohort High Range	2015-2016	466	
	2020-2021		393

Summarized below are the enrollment projection data calculations as they apply to a reorganization of the two districts into one K-12 school district.

FINDINGS OF THE STUDY

<i>DATA SNAPSHOT</i>				
Calculation	Year	Grades K-6	Grades 7-12	TOTAL GRADES K-12 FOR LONG TERM PLANNING
CURRENT COMBINED ENROLLMENT OF THE TWO DISTRICTS	2010-2011	1493	1578	3071
As of January 2012	January 2012	1438	1455	2893
Baseline Cohort Low Range	2011-2012	1439	1530	2970
	2012-2013	1399	1439	2839
	2013-2014	1374	1370	2744
	2014-2015	1341	1341	2682
	2015-2016	1300	1315	2616
Baseline Cohort Mid Range	2011-2012	1458	1530	2989
	2012-2013	1468	1439	2907
	2013-2014	1447	1370	2817
	2014-2015	1411	1341	2752
	2015-2016	1385	1316	2701
Baseline Cohort High Range	2011-2012	1464	1530	2995
	2012-2013	1475	1439	2914
	2013-2014	1472	1370	2842
	2014-2015	1460	1341	2801
	2015-2016	1448	1315	2763

FINDINGS:

Ichabod Crane: Elementary grades K-6 enrollment is estimated to decrease between 10 and 125 pupils over the next five years. Grades 7-12 enrollment is estimated to decrease between 160 to 240 pupils over the next ten years.

Schodack: Elementary grades K-6 enrollment is estimated to decrease between 35 and 70 pupils over the next five years. Grades 7-12 enrollment is estimated to decrease by about 150 to 170 pupils over the next ten years.

If the communities authorized a reorganization of the two districts into one, the earliest the new district could begin operation is on July 1, 2013. It is expected that the K-6 enrollment will be between 1374 and 1472 pupils in 2013-2014 compared to the combined 2010-2011 enrollment of 1493 for grades K-6. The new district can expect a grades 7-12 enrollment in 2013-2014 of reorganization of about 1341 pupils compared to the combined 2010-2011 enrollment of 1370 for grades 7-12.

The most conservative enrollment projection estimates a total of 2744 pupils in grades K-12 for a reorganized district in year one of operation in 2013-2014. A mid-range projection estimates a total of 2752 pupils and the high-range projection estimates a total of 2817 pupils for grades K-12. In 2010-2011, the two districts combined serve 3071 pupils in grades K-12.

The study uses the *mid range* projection estimates for 2015-2016, five years from the 2010-2011 school year, in its analyses. The enrollment projection of 2701 pupils in grades K-12 (1385 pupils in grades K-6 and 1316 pupils in grades 7-12) is used as a baseline in reviewing program opportunities, staffing, and use of facilities to deliver a ‘*what if*’ program if the two districts reorganized into one.

FINDINGS OF THE STUDY

Themes of observations by the Community Advisory Joint Committee regarding the enrollment projections data:

Possible Opportunities:	Possible Challenges:
◇ The larger potential base of students combined allows more participation in more and different classes.	◇ Keeping costs under ‘control’ by individual districts while the student enrollment base may be declining at various grade levels probably will be difficult.
◇ Better use of the faculty and staff we have without increasing class sizes or running classes that are just too small because of declining overall enrollment.	◇ How can we use our current buildings the best given what the enrollment estimates suggest?
	◇ When is the point when a high school student population is just too small to offer a complete program with quality and the opportunities expected for all of the pupils?

2. Federal Census Demographic Data Snapshot of the Two School Districts

A valuable tool to use as the Boards and communities make value judgments about future enrollments and the outlook for the Ichabod Crane and Schodack school districts is Federal Census data. Within 18 months, 2010 Census data probably will begin to be available for use by school districts. Below is a chart that lists some of the most salient demographic characteristics reported by the 2010 Census estimate for the five year period 2005-2009. The Census data are included in this report to provide a tool for more in-depth analysis which may provide insights into how potential new population, new housing or employment opportunities may or may not affect the enrollment of the school district in the future. In addition, a review of the Census data variables can provide insights into: community education program opportunities, K-12 program variables related to the community profiles, public relations/communication strategies with various subsets of the population in the district, and other school district issues and roles as the school districts plan for the future. Discussing the similarities and dissimilarities of the characteristics of the two school districts can be valuable as the Boards, senior leadership, and the communities define short range and long-range plans for the districts. The Census data are meant to engage discussion about how to serve the pupils and the communities of the school districts.

The **DATA** section of the study report starting on page -63- includes a comprehensive list of demographic characteristics of each school district in two categories: *Demographic and Housing Estimates, Social Characteristics, Economic Characteristics, and Housing Characteristics.*

An example discussion question for Ichabod Crane and Schodack based on the Census data might include:

- ✓ What challenges and/or opportunities do the following demographic characteristics present to the mission of providing public education in the two districts reorganized into one; separately?
 - 4.4% of the Ichabod Crane school district population is under five years old; 4.8% for the Schodack school district; What might encourage new population with pre-schoolers or school age children to move to the area?
 - the median age of the Ichabod Crane school district is 45.1 years; 41.4 for Schodack; Typically 20 to 44 is considered to be prime ‘childbearing years’. What might encourage new population in the 20 to 44 year age group to move to the area?

FINDINGS OF THE STUDY

- 22.1% of the Ichabod Crane school district households include one or more people over 65; 23% for Schodack; 33.8% of the Ichabod Crane school district households include one or more people under 18; 37% for Schodack;
- 88.1% of the population in the Ichabod Crane school district were in the same residence one year ago; 90.7% of the population in the Schodack school district were in the same residence one year ago. Both districts have stable year-to-year general populations.
- 91.3% of the Ichabod Crane population has a high school diploma or higher; 89.7% of the Schodack school district population;
- average household income in the Ichabod Crane district is \$83,907; \$84,759 in the Schodack district;
- average family household income in the Ichabod Crane district is \$91,232; \$93,236 in the Schodack district;
- 4.1% of all the family households in Ichabod Crane are below the poverty level; 9.3% in Schodack;
- 5.7% of the total population of Ichabod Crane are below the poverty level; 9.5% in Schodack;
- 7.1% of all people under 18 in Ichabod Crane are below the poverty level; 11.2% in Schodack;
- 2.8% of all people 65 years and older in Ichabod Crane are below the poverty level; 5% in Schodack;
- 77.2% of the housing units in Ichabod Crane are owner-occupied; 82.2% in Schodack;

A team of ‘guest outsiders’ cannot judge what characteristics are *similar* or *dissimilar*—only those who live in the districts who are part of the culture and value system can make that judgment. The ‘number’ data reported by the Census for many demographic characteristics of the two school districts seem to be in close range to each other.

Themes of observations by the Community Advisory Joint Committee regarding the census demographic characteristic data:

Possible Opportunities:	Possible Challenges:
◇ Despite the two districts represent two district “communities”, the demographics are remarkably similar.	◇ Overcoming community resistance to giving up unique sense of each school district.
◇ Given that the demographics are very similar it is possible a merger would be cohesive.	◇ The median age of the Ichabod Crane population is not in the range considered ‘child-bearing’ years. The median age of the population of Schodack is at the upper end of the ‘child-bearing’ range. Without new population moving in at a ‘family-building age’, what happens to the number of school-aged population in the school districts?
◇ The two school districts are supporting very similar students.	

FINDINGS OF THE STUDY

Themes of observations by the Community Advisory Joint Committee regarding the geography of the location of the existing school buildings of the two school districts:

Possible Opportunities:	Possible Challenges:
◊ Serving as many grade levels in one location probably could provide better programs at a lower cost.	◊ The main campuses of the districts are less than 8 miles apart.
	◊ Younger children (probably grades K through 4) should be bused the least. Possibly maintain local elementary schools in the overall plan.
	◊ Try and keep bus routes to no longer than the time length.

5. Fiscal Condition Profiles of the Two Districts

Each district is required to file an external audit report annually with the NYS Comptroller. Such reports include observations about the finances as well as the practices that the school district employs to securely manage funds. Charted below are the observations of the respective external auditors hired by Ichabod and Schodack written in the respective audit reports for the fiscal year ending June 30, 2011. Typically, school districts take corrective actions if appropriate in the subsequent fiscal year. The status of corrective actions is often a part of the Annual Report for the fiscal year ending June 30, 2012 which is prepared by October 1, 2012.

External Auditor Observations and Recommendations written in the Annual Audit Report: fiscal year ending 6/30/11
Ichabod Crane Central School District
1. Condition: For the year ended June 30, 2011, the District was required to implement a policy to comply with the requirements of GASB 54. This policy must state the entity or person with the authority to assign fund balance as well as the order of use of fund balance by the District. Recommendation: Review the components of GASB 54 and that the Board approves a policy to comply with the requirements.
2. Condition: There are several old outstanding Section 4408 receivables in the Special Aid Fund dating back to the 2004-2055 school year. Recommendation: Annually evaluate district receivables for this program and write off any deemed uncollectible. If such funds are subsequently received, the District can record them as miscellaneous revenue at that time.
3. Condition: There are several fundraisers which profit and loss statements were not filled out. Recommendation: Review procedures for extraclassroom activity funds and ensure profit and loss statements are received for all fundraisers.
4. Prior Condition: In the year ending on 6/30/10, there were several line items within the General Fund budget that were overspent. Status: One budget line item overspent for the year ending 6/30/11. Recommendation: Authorize budgetary transfers during the year to cover any budgetary shortfalls.
5. Prior Condition: In the year ending on 6/30/10, there is a deficit balance in the School Lunch Fund of \$189. Status: The deficit has increased to \$37,669 for the year ending 6/30/11. Recommendation: Continue to evaluate pricing and costs within the School Lunch Fund and the support from the General Fund in order to eliminate deficits.
6. Prior Condition: In the year ending on 6/30/10, the annual revenue and expenditure budgets were significantly different from actual. The district should be able to budget relatively close to actual based on available information. For example, revenues were over budgeted for items such as State aid, interest and earnings, as well as transfers from Special Aid and Debt Service. The expenditures for interest were not correct and should be able to be budgeted for an exact amount. Status: Condition remains unchanged for the year ending 6/30/11. Recommendation: Ensure that the General Fund budget is more reflective of current conditions and that, at least on the revenue side, the District should be more conservative to ensure a more realistic fund balance position estimate at year end.
Schodack Central School District
The external auditor reports that as of June 30, 2011, "We did not identify any deficiencies in internal control over financial reporting that we consider be material weaknesses." A deficiency in internal control exists when the design or operation of a control does not allow the District to prevent, detect and correct misstatements on a timely basis

FINDINGS OF THE STUDY

Mr. Patrick J. Powers, CPA, PFS senior partner of D’Arcangelo & Co. and a part of the Study Team analyzed the financial characteristics of the two school districts. School District fiscal condition is dependent on a number of issues. A major challenge in the current economic environment is that the school districts need to be able to absorb State Aid decreases, maintain a sound educational program, and deal with increasing expenses with such items as utilities, health insurance, employee retirement system payments.

Some indicators of fiscal health include such items as:

- Fund balance, including reserves?
- Excess of revenues over expenditures?
- How reliant is the school district on State aid?
- Excess appropriation of fund balance?
- Comparison of budgeted revenues and expenditures to actual?
- School Lunch subsidies?
- Status of tax certiorari or any litigation outstanding?

The **DATA** section of the study report starting on page -73- includes an analysis of expenditures, revenues, fund balances, and long term debt of the two districts for the fiscal year ending June 30, 2011.

Charted below are the unreserved/unallocated fund balance percentages of the annual approved budgets for the fiscal year ending June 30, 2011.

Unreserved/Unallocated Fund Balance as a % of the Annual Approved Subsequent Year Budget (2011-2012)		
	Ichabod Crane	Schodack
June 30, 2011	1.48%	3.84%

Below is a fiscal condition summary comparison of the two districts based on the 2010-2011 fiscal year.

FINANCIAL CONDITION COMPARISON AS OF JUNE 30, 2011

	INDICATORS	SCHOOL DISTRICT		OBSERVATIONS
		Ichabod (Kinderhook)	Schodack	
1	General Fund Excess Revenues Over Expenditures Last Two Years?	No	No	Schodack had excess revenues in 2010.
2	State and Federal Aid / Total Revenue	39.10%	38.90%	Capital Region average is 44.5% for State and Federal Aid.
3	K-12 Public School Enrollment including Charter Schools	2,027	1,091	Per State Aid GEN Report.
4	General Fund Expenditures per Pupil	\$16,459	\$18,229	Capital Region average is \$18,278 per pupil per OSC Research Brief.
5	Debt Service as a % of Expenditures	5.63%	13.07%	Capital Region average is 8.6%.
6	Percent of Unexpended 2011 Budget	12.1%	2.9%	
7	Percent of Revenue Under Budget	-8.9%	-0.70%	Ichabod budgeted \$3,128,600 in interfund revenues and transfers not taken.
8	2011 Excess (Deficit) Revenues and Expenditures to Budget	3.2%	2.2%	Schodack close on both revenue and expenditure budgets.
10	School Lunch Fund Balance at June 30, 2011	(\$37,669)	\$45,133	Schodack contracts for School Lunch service. School Lunch Fund had a deficit in Ichabod at June 30, 2011
11	School Lunch Subsidy from General Fund?	Yes - \$22,000	No	

FINDINGS OF THE STUDY

EXPENDITURES FOR THE YEAR ENDED JUNE 30, 2011

	Financial Characteristic/ Element	Ichabod (Kinderhook)	Schodack	Observation/Items to note or consider:
1	Expenditures (2011):			
2	Total	33,361,785	19,888,231	
3	General Support	3,611,476	2,388,193	
4	% General Support of Total	10.83	12.01	
5	Instruction	17,630,970	9,801,353	
6	% Instruction of Total	52.85	49.28	
7	Employee Benefits	8,346,608	4,170,312	Retiree health insurance is \$1,578,254 and \$909,131, respectively. Both districts' health and worker's compensation plans are with the RCG Consortium.
8	% Employee Benefits of Total	25.02	20.97	
9	Sub-total General Support, Instruction, and Employee Benefits	29,589,054	16,359,858	
10	% Total General Support, Instruction, and Employee Benefits of Total	88.69	82.26	Although a higher percentage of expenditures, Ichabod is \$397 per pupil less than Schodack.
11	Transportation	1,894,756	929,857	Ichabod has three times the mileage of Schodack
12	% Transportation of Total	5.68	4.68	
13	Debt Service	1,877,975	2,598,516	Schodack significantly higher due to 2008 bonding of capital project.
14	% Debt Service of Total	5.63	13.07	

REVENUES FOR THE YEAR ENDED JUNE 30, 2011

	Financial Characteristic/ Element	Ichabod (Kinderhook)	Schodack	Observation/Items to note or consider:
1	Revenues (2011):			
2	Total	33,012,068	19,382,430	
3	Real Property Taxes and Tax Items (including STAR)	19,460,616	11,158,956	Subject to Real Property Tax Cap in 2012-13.
4	% Real Property Taxes of Total	58.95	57.57	
5	State Aid	11,677,190	7,090,793	
6	% State Aid of Total	35.37	36.58	In both Districts, Real Property Taxes and State Aid comprise approx. 94% of revenues.
7	Federal Aid	1,242,337	449,882	Primarily ARRA Stabilization Funds received. No longer available after 2011.
8	% Federal Aid of Total	3.76	2.32	
9	Charges for Services	244,743	227,257	Schodack includes \$56,887 in tuition from individuals and \$85,947 in tuition from other districts. Ichabod includes \$200,839 in tuition from other districts.
10	% Service Charges of Total	0.74	1.17	
11	Miscellaneous	276,168	433,726	Includes BOCES and other refunds of prior years expenses plus other unclassified revenues.

FINDINGS OF THE STUDY

LONG-TERM DEBT AS OF JUNE 30, 2011

	Financial Characteristic/ Element	Ichabod (Kinderhook)	Schodack	Observation/Items to note or consider:
1	Enrollment	2,027	1,091	
2	Serial Bonds Due at 6-30-11 (1,000s)	9,450,000	19,080,000	Includes \$16,095,000 in serial bonds issued in 2008 for renovations for Schodack.
3	Anticipated Bonding on Projects	0	0	
4	Total Estimated Debt	9,450,000	19,080,000	
5	Total Estimated Debt Per Student	4,662	17,489	
6	Building Aid %	83.5%	86.6%	Includes 10% incentive building aid.
7	Estimated Aid Per Student	3,893	15,145	
8	Debt Per Student	769	2,343	
9	Funds Available:			
10	Debt Service Fund	452,798	317,806	
11	Funds Available Per Student	223	291	
12	Net Debt Per Student	546	2,052	

FUND BALANCE AS OF JUNE 30, 2011

	Financial Characteristic/ Element	Ichabod (Kinderhook)	Schodack	Observation/Items to note or consider:
1	Reserves:			
2	Encumbrances (Purchase Orders Still Open)	138,891	44,646	Purchase orders outstanding at year end - added to 2011-12 budget.
3	Unemployment Insurance	452,884	351,814	Each District has a significant amount in this reserve.
4	Worker's Compensation	0	388,524	Ichabod has recorded \$250,000 in Workers' Compensation liability in long-term debt.
5	Employees' Retirement Contributions	246,340	224,972	No reserve is available for Teachers' Retirement Contributions.
6	Tax Certiorari	70,145	356,379	Ichabod returned \$119,213 in Real Property Taxes in 2011.
7	Employee Benefit Accrued Liability Reserve	662,554	221,460	Neither District has excess EBALR when compared to calculated compensated absences.
8	Capital Reserve (Voter approval required to establish and fund)	0	0	Should consider establishing, with voter approval, in a combined District.
9	Repair Reserve (Voter approval required to fund, public hearing to spend)	129,855	0	
10	Mandatory Reserve Fund	544,261	0	Shows as a Reserve for Debt Service in the General Fund in Ichabod.
11	Insurance			
12	Property Loss and Liability			Schodack has recorded \$355,241 in judgments and claims in long-term debt.
13	Tax Reduction			
14	Total Reserves	2,244,930	1,587,795	
15	Unreserved:			
16	Appropriated Fund Balance to Reduce Taxes in 2011-12	500,000	772,313	
18	Unreserved Undesignated Fund Balance (Subject to 4.0% of subsequent year's budget)	1,288,115	778,916	
19	Total Unreserved	1,788,115	1,551,229	Average Unreserved Fund Balance for Capital region is 11.7% of expenditures for year ended June 30, 2010.
20	Fund Balance as a % of 2011 Expenditures			
21	Reserves	6.73	7.98	
22	Unreserved Appropriated to Reduce Taxes in 2011-12	1.50%	3.88%	Schodack appropriating a much higher percentage than Ichabod.
23	Appropriated Fund Balance for Other Purposes			
24	Unreserved Undesignated	3.86%	3.92%	Consistent - both District's below 4.0%. Both Districts total unreserved fund balance is below average of 11.7%.
25	Debt Service Fund Balance - 2011	452,798	317,806	

FINDINGS OF THE STUDY

Tax Certiorari: ED Law 3651.1-a: The monies held in reserve shall not exceed the amount that might reasonably be deemed necessary to meet anticipated judgments and claims arising out of tax certiorari proceedings. Any resources deposited to the reserve which are not expended for such proceedings in the year such monies are deposited must be returned to the General Fund on or before the first day of the fourth fiscal year after deposit of these monies.

Ichabod Crane School District	Schodack School District
In fiscal year ending 6/30/10, \$194,020 was in the Tax Certiorari Reserve. During fiscal year ending 6/30/11, an authorized transfer of \$123,875 was made to unreserved undesignated fund balance. As of 6/30/11, \$70,145 was in the Tax Certiorari Reserve.	In fiscal year ending 6/30/10, \$356,379 was in the Tax Certiorari Reserve. During fiscal year ending 6/30/11, no transfers were made to unreserved undesignated fund balance. As of 6/30/11, \$356,379 was in the Tax Certiorari Reserve.
Est. Refund exposure for 2009 taxes: \$50,936	Est. Refund exposure for 2009 taxes: ?
Est. Refund exposure for 2010 taxes: \$41,942	Est. Refund exposure for 2010 taxes: ?

OVERALL FINDINGS:

- Health insurance expenditures in Ichabod Crane are significantly higher than they are for Schodack. This appears to be due to higher retiree health insurance obligations.
- Debt Service expenditures in Schodack are higher both per student and as a percentage of total expenditures than Ichabod Crane. This is due to the recent bonding of a Capital Project (2008).
- Ichabod Crane has a significantly higher percentage (12.1%) of unexpended budgetary appropriations than Schodack. This amount is supported on the estimated revenue side of the budget by miscellaneous revenues and transfers from reserves not taken. Therefore, Ichabod in 2010-2011 spent much less than was estimated to be spent in the fiscal year. Estimated revenues for 2010-2011 were -8.9% from what was estimated to be received. Not ‘spending’ budgeted appropriations ‘makes up for’ the over estimate of revenues to be received. In 2009-2010, Ichabod Crane had 11.4% of unexpended budgetary appropriations. The revenues received for 2009-2010 were -5.5% under what was estimated revenue to be received. Expenditures are very close to budgeted amounts in Schodack (2.9% unexpended) for 2010-2011. Revenues are only -.7% under what were budgeted by Schodack in 2010-2011. An average ‘financial health amount’ for school districts is that received revenues are within 1-3% of budgeted revenues, and that about 4-7% of budgeted expenditures are left unexpended in a fiscal year.
- Both districts are below the average Unreserved Fund Balance for the Capital Region of 11.7% (5.36% for Ichabod Crane and 7.8% for Schodack).
- Each District is in the low range regarding the funding of allowable reserves. Restricted reserves total 6.73% for Ichabod Crane and 7.98% for Schodack of expenditures for 2011.
- Schodack has reduced the property tax levy by appropriating undesignated fund balance to a high level that will be difficult to maintain in future budgets.
- In fiscal year ending June 30, 2011, Ichabod Crane and Schodack are below the 4% unreserved undesignated fund balance outlined in education law.

A chart that shows the 2011-2012 property tax levies and rates of each of the school districts is provided below.

FINDINGS OF THE STUDY

Town	Total Accounts	Assessed Value Tax Levy August-11	Assessed Value Apportionment August-11	Equalization Rate	Full Value	School Tax Levy	Percent of Tax Levy	Tax Levy Dollars	2011-2012 Tax Rate
<u>Ichabod Crane</u>									
Chatham		67,601,216	67,601,216	0.7151	94,533,934	20,171,248	6.8457%	1,380,860	20.43
Ghent		64,115,570	64,115,570	1.0740	59,697,924	20,171,248	4.3230%	872,010	13.60
Kinderhook		861,122,845	861,122,845	1.0000	861,122,845	20,171,248	62.3583%	12,578,449	14.61
Nassau		6,893,884	6,893,884	0.6800	10,138,065	20,171,248	0.7341%	148,087	21.48
Schodack		38,488,725	38,488,725	1.0000	38,488,725	20,171,248	2.7872%	562,206	14.61
Stockport		96,870,027	96,870,027	0.8400	115,321,461	20,171,248	8.3510%	1,684,504	17.39
Stuyvesant		201,624,310	201,624,310	1.0000	201,624,310	20,171,248	14.6006%	2,945,133	14.61
Total		1,336,716,577	1,336,716,577		1,380,927,264		100%	20,171,248	
					14.61	Tax Rate on \$1000 of Market Value			
<u>Schodack</u>									
Schodack		587,129,968	587,131,468	1.0000	587,131,468	11,485,159	99.174219%	11,390,317	19.40
Stuyvesant		4,888,792	4,888,792	1.0000	4,888,792	11,485,159	0.825781%	94,842	19.40
Total		592,018,760	592,020,260		592,020,260		100%	11,485,159	
					19.40	Tax Rate on \$1000 of Market Value			

A major challenge in this time period of less state support of local school district expenditures with state aid is the resulting influence on the local true tax rates of school districts. Historically, both the Ichabod Crane and Schodack school districts have diligently prepared yearly budget expenditures that as best as possible balanced student program offerings with what state funds were available and with the level of local property tax contribution thought to be affordable for their communities.

A **challenge** that may inhibit the flexibility of a reorganization financial plan for the combination of the two districts into one is the reality that there is a *32.79% difference* in the current property tax rates on true value between the two school districts in the 2011-2012 fiscal year. The ‘reorganization roadmap’ offered by the study to describe *What might a reorganization look like?* attempts to balance student program opportunities perceived from a local perspective that one might expect to result from such a major action as a reorganization of two school districts, and the resulting calculation of property taxes in a single reorganized school district. Throughout the study process the Study Team heard from stakeholders including the Boards of Education about possible opportunities and challenges of a reorganization. They suggest that a reorganization should be able to bring about options to deliver the program in different ways or with different resources to ensure a comprehensive educational program with a long-term view for all students. The year-to-year ‘scaling-back’ over the past few budget years, it seems, has seriously jeopardized the long standing values of both school districts in providing a diverse and comprehensive educational program for all students.

In the final analysis by the communities, it may be judged that the mathematical reality of such a wide gap in the current level of taxation between the two school districts currently, as measured by the tax

FINDINGS OF THE STUDY

rate on true value, may be too great to overcome. In the final analysis by the communities, it may be judged that a reorganization of the two districts into one may be a prime viable tool to help the communities ensure the offering of a comprehensive public education program over the long-term future.

5. Historical Perspective of Referendum Votes of Each District Since 2005 there have been a total of 33 public referenda in the two school districts for the annual budget, bus purchases, and capital projects. All but 6 of the public referenda were approved by the voters since 2005.

HISTORY OF PUBLIC REFERENDUM: ICHABOD CRANE											
BUDGET REFERENDUM				BUS REFERENDUM				CAPITAL BUDGET REFERENDUM			
DATE	\$ AMOUNT	# VOTED 'YES'	# VOTED 'NO'	DATE	\$ AMOUNT	# VOTED 'YES'	# VOTED 'NO'	DATE	\$ AMOUNT	# VOTED 'YES'	# VOTED 'NO'
5/17/11	33,837,503	1094	1594								
5/18/10	37,738,582	1093	593	5/18/10	428,000	901	750				
5/19/09	38,477,102	902	607	5/19/09	290,000	852	643				
5/20/08	36,970,148	822	621	5/20/08	518,000	809	629				
								12/11/07	4,360,000	451	157
5/15/07	35,378,368	1039	679	5/17/07	515,000	1023	682				
								12/12/06	707,000	455	141
5/16/06	33,901,740	1507	1449	5/16/06	358,000	1420	1485				
6/21/05	30,316,810	2061	1376								
5/17/05	30,350,408	909	989	5/17/05	331,500	958	924				
HISTORY OF PUBLIC REFERENDUM: SCHODACK											
5/17/05	18,139,177	559	443	5/17/05	186,000	523	410				
5/16/06	18,852,499	594	467	5/16/06	209,000	598	452	10/26/06	17,578,206	711	495
5/15/07	19,788,658	443	415	5/15/07	238,000	418	404				
5/20/08	21,608,161	559	709	5/20/08	240,000	569	660				
6/17/08	21,385,989	617	609	6/17/08	240,000	555	661				
5/19/09	21,381,275	783	308	5/19/09	235,859	664	400				
5/18/10	20,487,720	681	443	5/18/10	195,863	577	519				
5/17/11	20,125,047	700	485	5/17/11	212,000	580	562				

B. The School Buildings in the Two School Districts

1. Pupil Capacity of Each of the School Buildings

The study provides a school building pupil capacity assessment that first documents how the instructional spaces in all of the school buildings of the two school districts are utilized in the 2010-2011 school year to deliver *the pre-kindergarten through grade twelve program including special education*. Second, it provides an assessment of pupil capacity of each building as defined by local class size teacher contractual definitions and the local school district goals of each school district.

The pupil capacity analysis of each school building starts on page -85- in the **DATA** section of the study report.

The pupil capacity analysis is based on the following assumptions:

- ✓ The pupil capacity analysis is based on delivering instruction with the following class size goals. The class size goals were identified by the superintendents and leadership teams of each school district.
 - Kindergarten and grade 1: 20 pupils
 - Grades 2 and 3: 22 pupils
 - Grades 4, 5, and 6: 24 pupils
 - Grades 7-12: 25 pupils

FINDINGS OF THE STUDY

(Note: Often for *specialized* Grades 7-12 courses, it is likely that the class sizes for such specialized courses may be between 10-(or fewer pupils as approved by the board)-and 25 pupils. During other instructional periods of the day, it is likely a classroom will host class sizes near the 25 pupil number for other courses less specialized.)

- ✓ Spaces now designated for instructional support are generally assumed to continue for instructional support.
- ✓ State Education Department guidelines are applied in calculating the number of pupils that a specific type of classroom should serve.
- ✓ The analysis, at the present time, does not include renting classrooms to the BOCES to host consortium shared programs.
- ✓ Current spaces used for central administration are not ‘re-claimed’ for instructional program pupil capacity.
- ✓ It is assumed for this pupil capacity analysis that there are no renovations to change existing space or the building of new additional space.

Given the above assumptions, the pupil capacity of the school buildings of the Ichabod Crane and Schodack Central School Districts are charted below:

Ichabod Crane K-6 Pupil Capacity	Schodack K-6 Pupil Capacity	Ichabod Crane 7-12 Pupil Capacity	Schodack 7-12 Pupil Capacity
Primary School K-3: 552	Castleton Elem. K-5: 462	Middle School 7-8: 362	Middle School 7-8: 385
Middle School 4-6: 432	Middle School 6: 96	High School 9-12: 945	High School 9-12: 445
Total K-6 Pupil Capacity Available:		Total 7-12 Pupil Capacity Available:	
1542		2137	
<i>Plus Total K-6 Pupil Capacity in closed school buildings: 462</i>			
Anticipated K-6 Pupil Capacity Need in 2015-2016:		Anticipated 7-12 Pupil Capacity Need in 2015-2016:	
1385		1316	

Themes of observations by the Community Advisory Joint Committee regarding the existing school building pupil capacity in the two school districts:

Possible Opportunities:	Possible Challenges:
◇ A reorganization of the two school districts into one likely will not need new construction or massive renovations.	◇ Determining which buildings get used for what purpose. Might be emotional for some.
◇ Reorganization might make better use of the school buildings of the current two school districts.	◇ The development of a student transportation program .
◇ Reconfiguration of grade levels housed in the various buildings could enhance education concentration and success; and could eliminate some costs for the short and long term.	

2. Infrastructure Condition of the Existing School Buildings

When the districts began the study grant application process, the two school districts together operated a total of 8 instructional school buildings. In addition, each district operated a bus/transportation facility and Ichabod Crane a Maintenance Facility for a total of 11 buildings. In 2011-2012, the Ichabod school district closed two elementary schools. A reorganized district would inherit all 11 buildings.

Each of the districts completed its five-year Building Condition Survey (BCS) during the 2010-11 school year as required by NYS law. Those documents, completed by licensed architects and filed with the New York State Education Department provide a thorough assessment of each of the eleven buildings

FINDINGS OF THE STUDY

(including the two closed elementary buildings owned by the districts. In the hundreds of items and systems examined in each of the 11 buildings, no items were judged “non-functioning” or “critical failure” (see DATA Set page -103- for definitions).

The summary of the Building Condition Surveys of each School District building begins on page -103- in the **DATA** section of the study report.

Some items were deemed “Unsatisfactory” in the Ichabod Crane instructional buildings. These include several outside infrastructure items such as parking lot resurfacing, playground surfacing, lawns and storm water pipes. It also included internal items such as water system at the Middle School; and interior doors, wiring, lockers, gym floor, lighting fixtures, and windows at the high school. A few items such as lockers, flooring, exterior doors and windows were deemed “Unsatisfactory” in the Ichabod Crane Bus Garage.

The Ichabod Crane District completed a \$4.3 million project which was approved by voters in 2007. The Schodack district recently completed a 2006 voter-approved \$17.5 million capital project that addressed many items in need. Therefore, the list of estimated expenses for the next 5 years as per the Building Condition Survey was minimal. Only a hot water heater and smoke detector system in the bus garage was deemed “unsatisfactory.”

The total combined estimated capital construction expenses for the two districts through 2015-2016 as per the Building Condition Survey Reports of 2010 would be approximately \$15.5 million. This figure breaks down to approximately \$12.6 for Ichabod Crane and approximately \$2.9 for Schodack.

For a complete Building Condition Survey that was filed with SED, please contact the respective district office. Please note that it is possible that some of these items may have been addressed by the district after the Building Condition Survey was filed. It is also possible that the condition of some of these items may have changed since the report was filed with SED.

While the Building Condition Survey Reports do suggest some repairs, renovations etc, none of the buildings would require major renovations to house students safely in the new district should reorganization occur. However, the study does recommend that the District Office of the new district be housed in the current Ichabod Crane Middle School and the current Schodack District Office located currently in the Schodack High School be retrofitted to be used for grades 7-8 instructional space in the new middle school for the reorganized school district. Also, since the high school program would be

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located in the current Ichabod Crane High School which is projected to be near pupil capacity, a review of that facility would be critical as part of the district's long-range facilities planning.

The two school communities, through their respective boards of education and administration, have maintained their school buildings through periodic and responsible repairs, renovations and additions via capital projects over a sustained period of time. However, there are some areas that would need attention in the coming years, regardless of whether reorganization occurred or not.

Due to declining enrollment over time, the economies of scale realized when reorganizing two districts into one and the planning the districts did in protecting and maintaining the facilities, no new construction or major renovations should be required to house students and staff safely in year one if these districts reorganize. It should be noted that demographics like enrollments and conditions may change over time for this reorganized district as with other school districts in the state. Therefore, any housing or capital improvement initiatives will change in subsequent years from the plans considered for year one by the findings of this study.

Themes of observations by the Community Advisory Joint Committee regarding the building conditions of the buildings in the two school districts:

Possible Opportunities:	Possible Challenges:
<ul style="list-style-type: none"> ◇ The reorganized school district should be able to house safely all students and staff. The facilities would not require immediate additions, renovations or repairs. Retrofitting the current Schodack District Office to support student programming is not absolutely necessary for year one of reorganization. 	<ul style="list-style-type: none"> ◇ At some time prior to or within the first year of the reorganized district, management may wish to address some of the items identified in the Building Condition Surveys. Even though the reorganized district will have a 10-year window with its enhanced building aid ratio, it may need to commence a thorough review in year one of the merger.
<ul style="list-style-type: none"> ◇ The new District could avail itself of the possible 95% reorganization incentive building aid ratio that will exist for ten years. This state building aid ratio and subsequent contract with NYS could substantially fund repairs and renovations to all facilities and grounds. 	<ul style="list-style-type: none"> ◇ Since some schools in the reorganized district would not be scheduled to house the aged students as they were originally designed, some retrofitting in subsequent years may be required as to support program/curriculum delivery decisions made by the district.

RECOMMENDATION:

If the Districts' communities affirm a reorganization as prescribed by law, the new district should immediately establish a Facilities Transition Committee to address the issues related to facilities, grounds and playing fields. This committee should have broad-based composition including, but not limited to, representatives from both merged districts; buildings and grounds staff, students, faculty, support staff, administration, parents, community and perhaps a school architect as an advisor.

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The new District could avail itself of the possible 95% incentive building aid ratio that can be accessed during the first ten years of the new district. This state building aid for a newly organized school district could substantially fund repairs and renovations to all facilities and grounds that could last and serve the community and generations of pupils far into the future.

The new district has a ten-year window to qualify for the enhanced building aid. The State Education Department requires signed contracts with a general contractor for any capital project *within* the ten-year window. Reasonably, it usually takes up to two years to plan a capital improvement project, propose a public referendum, design, obtain final SED approval and complete the competitive bidding process.

The “*What If*” *Financial Picture* of a possible reorganized district described by the study includes the suggestion that funds be placed in a capital reserve with the approval of the voters. Once the reorganized district identifies a long range facility plan with the community, the district and community will have an appropriate reserve to use toward the local funding of that facility plan which will qualify for 95% State Building Aid for all SED approved expenses.

Therefore, it is recommended that the new District upon organization should immediately engage the services of a professional architectural firm and, with their assistance, carefully and cost-effectively develop a long-range plan to address all the items listed in the Building Condition Survey Reports and any facilities-related changes necessary for program improvement. In addition, the newly organized District should consider engaging the services of an experienced architect and/or consultant with expertise in renewable energy systems. It is suggested that the long-range plan should also include steps to institute a variety of renewable energy options to reduce energy expenses in the district's annual operating budget.

C. The Educational Program in the Two School Districts

1. Current Class Sizes Grades K-12

Charted below is a list of any teacher contract language and/or School Board policies currently in place that refers to class size.

Ichabod Crane Central School District Teacher Contract Language	
In June of 2008 the Board of Education adopted as one of the district’s strategic planning goals the following: Primary and Elementary Schools Program Goals 1. In Grades K-3, limit class size to 18 or fewer students.	
Article 20, (A) of the contract with the Teachers’ Association delineates other class size goals of the district as follows: A. To the extent possible, within existing facilities and available staff, every effort shall be made to schedule and maintain a maximum student class size, as indicated below:	
Building/Subject	Enrollment Per Section

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1.	Elementary School	30	
2.	Middle School	30	
	Study Halls		90
3.	High School		
	All instruction (except as follows)	30	
	Technology, Business Education and Consumer Economics	20	
	Art		20
	Physical Education		40
	Study Halls		90
4.	No teacher of a subject area 7-12 will have an average teacher load of one hundred and fifty (150) pupils.		
5.	Children shall not be assigned to any classroom in larger numbers than the capacity of the teaching facilities available in that classroom.		
6.	The building administrator may, at his/her discretion, and within the available manpower allocations, assign two (2) teachers to any study hall having more students than the number listed in A-2 and 3 above.		
7.	Regents skills classes in the High School shall not exceed twenty-five (25) students.		
8.	No physical education teacher will have an average daily teaching load in excess of the guidelines A.1, 2, and 3.		
	a.	In the exceptional case where this limit is exceeded appropriate adjustments will be made in the teacher's total building assignments.	
B.	1.	If the number of students in any class or the total average daily teacher load shall exceed the maximum numbers indicated in Section A of this article, a teacher may inquire of his/her immediate supervisor as to the reason, therefore.	
	2.	The situation will be corrected within the existing available resources and facilities.	
	3.	Band and Chorus meetings K-12 shall be counted as thirty (30) students even if the number vastly exceeds thirty (30) members. This section supersedes B. 1 and 2.	
C.	It shall be understood that when, because of scheduling or special difficulties, it becomes necessary occasionally to have a class larger than that listed in Section A.2 and 3 of this Article, the primary factor in determining a teacher overload will be the overall daily pupil teaching load as described in section A.4 of this Article.		

Schodack Central School District Teacher Contract Language

Article 4

- 4.1 The board recognizes the fact that class size may play an important role in the District's total instructional program. Therefore, it shall periodically evaluate the class size structure and will seek advice from the professional staff of the District in that evaluation.
- 4.2 The Board will attempt to provide staffing to allow for a K-6 pupil/ratio ranging from approximately 27 to 30 students.

The superintendents report that each district tries to achieve the following class section sizes as a best practice in serving the pupils and in utilizing the skill sets of the teachers at each grade level:

Kindergarten and grade 1:	20 pupils per class section
Grades 2 and 3:	22 pupils per class section
Grade 4, 5, and 6:	24 pupils per class section
Grades 7-12 (core subjects):	25 pupils per class section

Charted below is a summary of the grades kindergarten through grade 6 class section size ranges and averages in each of the two school districts as of October 1, 2010 (K-3 in Ichabod Crane for grades K-3).

The total collection of class size data, including the size of each grade level section across the two districts starts on page -108- of the DATA section of the study report.

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2010-2011 SCHOOL YEAR GRADE LEVEL CLASS SECTION ENROLLMENTS AS OF OCTOBER 1, 2010

GRADE LEVEL	Ichabod Crane Elementary	Schodack Elementary	CLASS SIZE GOAL AS DEFINED BY THE DISTRICTS
<i>K Range</i>	20	20-22	
<i>K Average</i>	20	21	20
GRADE 1 Range	20-21	17-19	
GRADE 1 Average	21	18	20
GRADE 2 Range	20-21	18-22	
GRADE 2 Average	22	20	22
GRADE 3 Range	21-22	24-29	
GRADE 3 Average	22	25	22
GRADE 4 Range	20-23	23-25	
GRADE 4 Average	21	24	24
GRADE 5 Range	15-22	22-24	
GRADE 5 Average	19	23	24
GRADE 6 Range	21-27	22-26	
GRADE 6 Average	25	24	24

Charted below is a summary of the grades 7 through 12 English class section size ranges and averages in each of the two school districts as of October 1, 2010.

**2010-2011 SCHOOL YEAR GRADES 7-12 ENGLISH
CLASS SECTION ENROLLMENTS AS OF OCTOBER 1, 2010**

ENGLISH CLASSES GRADE LEVEL	Ichabod Crane High School	Schodack High School	CLASS SIZE GOAL AS DEFINED BY THE DISTRICTS
<i>GRADE 7 Range</i>	18-24	18-29	
<i>GRADE 7 Average</i>	22	25	25
GRADE 8 Range	20-26	15-21	
GRADE 8 Average	22	18	25
GRADE 9 Range	11-27	16-24	
GRADE 9 Average	19	20	25
GRADE 10 Range	6-25	13-24	
GRADE 10 Average	18	21	25
GRADE 11 Range	11-25	18-28	
GRADE 11 Average	18	24	25
GRADE 12 Range	13-21	13-24	
GRADE 12 Average	18	19	25

Findings:

- ✓ Across the two school districts eight out of ten sections of K are at the class size goal of 20 pupils; two are above the goal.
- ✓ Across the two school districts one out of ten sections of grade 1 is at the class size goal of 20 pupils; five are above the goal; four are below the goal.
- ✓ Across the two school districts one out of eleven sections of grade 2 is at the class size goal of 22 pupils; ten are below the goal.
- ✓ Across the two school districts four of nine sections of grade 3 are at the class size goal of 22 pupils; three are above the goal; two are below the goal.
- ✓ Across the two school districts one of nine sections of grade 4 is at the class size goal of 24 pupils; one is above the goal; seven are below the goal.
- ✓ Across the two school districts one of ten sections of grade 5 is at the class size goal of 24 pupils; none are above the goal; nine are below the goal.

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- ✓ Across the two school districts one of nine sections of grade 6 is at the class size goal of 24 pupils; six are above the goal; two are below the goal.
- ✓ There are 75 class sections of English classes in grades 7 through 12 across the two districts; three sections are at the goal of 25 pupils; seven sections are above the goal; 65 class sections are below the class size goal.

Themes of observations by the Community Advisory Joint Committee regarding the class section sizes currently in the two school districts:

Possible Opportunities:	Possible Challenges:
◇ Together the districts might have a better chance of keeping the lower class size goals instead of having to increase them due to the lack of money to keep instructional staff.	◇ When pupil enrollments decline they usually decline across all grade level ages as opposed to just one or two grade level age groups. Low class section sizes may decrease even further without necessarily reducing expenses because of fewer children enrolled.
◇ A combined volume of students at each age level/grade level probably will allow the two districts to keep low class sizes and do it with the same or fewer employees than are now on staff.	◇ The lack of a volume of enrollment at certain grade levels in the two districts does not allow the individual school districts to fully use the skills of the staff they have already. For example, if there are only 18 pupils in a grade 7 class with a local class size cultural standard of 24 pupils, then only 18/24 or 75% of the professional skill sets of the instructor are being utilized to serve pupils. Working to reach at least 90% of the grade level section class size goal is a good instructional goal and a good financial goal.
◇ A larger geographic area to provide public education will help to deal with decreases or increases of school age population in any one area.	◇ As finances get tighter, will the separate districts have to raise the class size goals to meet an affordable total budget?
◇ Similar class sizes now generally indicate that the districts have similar philosophies regarding appropriate class size.	◇ Will the number of high school students in grades 7-12 decline so that a full comprehensive set of courses will be able to be offered and still be affordable in each individual district?

2. The Elementary Program Offerings

Members of the Community Advisory Joint Committee met on three separate evenings to review information and ask questions of the respective districts' leadership teams. Representatives of the K-5, 6-8, and 9-12 programs took part in a panel discussion with the CAC and answered questions and provided insights about their programs. These meetings took place after CAC members had time to review data sets relative to each of the program areas. The data sets found in the data section provide an overview of the programs by listing out the various program elements of each district's elementary, middle level and 9-12 offerings. Members of the CAC were able to review a side-by-side analysis of the core and special area curriculum of each district. In addition, co-curricular and intramural sports available to students were listed as well as information related to special education and enrichment program options. This process of review included dedicated time at a CAC meeting to review and discuss both Ichabod Crane and Schodack's elementary, middle and secondary programs. Members were then able to work in sub-committees to formulate questions they would want to ask of the school leadership team. CAC members expressed that they had 'a better grasp of the current programming' at their districts as a result of the

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meetings. Additionally, they noted they better understood what could be potential enhancements/improvements to the programs if more resources were available to support the programs.

The data set which begin on page 113 of the DATA section of the study provide a snapshot of the programs by listing out the various program elements of each district's elementary offerings.

Major findings from the review of the elementary (K-5) program offerings include:

- ◇ Both Ichabod Crane and Schodack have maintained their core offerings for elementary students that meet required mandates and provide for an elementary program as per Part 100 of Commissioner's Regulations.
- ◇ Both programs utilize heterogeneously grouped instructional patterns where the teachers have major input into those patterns of instruction. In addition, Ichabod Crane involves the practice of looping of faculty at the early elementary grades, along with more traditional grade level patterns.
- ◇ Both districts have stressed the importance of support services at the elementary levels including dedicated guidance counselors at Ichabod Crane and social workers at Schodack elementary.
- ◇ Both CAC members and district staff expressed the importance of the culture at their schools and the caring support of the faculty and staff for the students. Additionally, it is apparent that each community holds their elementary schools in high regard. There is a strong feeling about the importance of the schools as the educational and cultural hub of the local communities.
- ◇ Due to expenditure reductions, enrichment opportunities for students have been reduced. Ichabod Crane does not offer after school/intramural programs for K-5. Schodack offers intramurals for grades K-5 two times a week where a late bus is provided for students. There also is a community based program (K-Kids) that takes place every other week that involves many Schodack elementary age students.
- ◇ Psychological and other related services primarily are used to meet IEP requirements of special education students.
- ◇ Speech instruction is available to meet mandated needs of students per IEP requirements and time is allocated for general education students. At Schodack, one of the speech pathologists works at the elementary level as part of the RTI (Response to Intervention) program.
- ◇ Both districts incorporate resource room instruction plus consultant teacher models to deliver instruction for special needs students. There also are specialized math instruction centers for special education students at both Ichabod Crane and Schodack.
- ◇ Although both CAC members and district staff expressed a belief that foreign languages should begin at the elementary levels, foreign language instruction is not available at the elementary level currently.
- ◇ Members of the CAC and the district leadership teams expressed concerns about what continued budget cuts will do to the elementary programs of both districts.

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Themes of observations by the Joint Community Advisory Committee regarding the Pre-Kindergarten through grade 5 program offering in the two school districts:

Possible Opportunities:	Possible Challenges:
<p>◇ Members of the CAC saw the potential for reorganization as a way to maintain important elementary programs. CAC members voiced concerns that budget cuts could disproportionately impact elementary programs, particularly in non-mandated areas of instruction, including enrichment type programming.</p>	<p>◇ The major concern for CAC members seen as a challenge is finding ways to maintain the unique characteristics of the present day elementary schools. Parents feel particularly close to these schools and will be concerned about the loss of the individual culture of the schools.</p>
<p>◇ There is the potential for greater coordination and articulation of curriculum in a reorganized district. A similar time schedule, textbook series and support resources all would benefit students.</p>	<p>◇ If there is a movement of some staff with the new reorganization, this was seen as being potentially both an opportunity and a challenge. It was agreed that there would need to be targeted professional development and administrative support to make the transition go as smoothly as possible.</p>
<p>◇ There presently are not foreign language opportunities at the elementary level. Research points to the importance of beginning a secondary language at an early age. CAC members were hopeful that a reorganized district could provide new opportunities for second language instruction at the elementary school.</p>	<p>◇ Melding text and resource materials could be a challenge. Both districts have substantial budgetary investments in instructional materials and work will need to be done to ensure that as many of these resources as possible will be utilized.</p>
<p>◇ CAC members and the school leadership teams expressed hope that reorganization could provide funding that would support improved professional development opportunities for staff. Research supports a highly trained teaching force as critical to improved test results.</p>	<p>◇ CAC members expressed that a challenge could be the instructional settings for the students if there is a new combined district. The specific needs of the elementary students will need to be properly addressed if they are moved to new buildings. Something as basic as the bathroom facilities will need to be examined to ensure that students are in physical settings that meet all their needs as young students.</p>
<p>◇ CAC members and the school leadership teams expressed hope that reorganization could provide funding that would support improved professional development opportunities for staff. Research supports a highly trained teaching force as critical to improved test results.</p>	<p>◇ CAC members expressed that a challenge could be the instructional settings for the students if there is a new combined district. The specific needs of the elementary students will need to be properly addressed if they are moved to new buildings. Something as basic as the bathroom facilities will need to be examined to ensure that students are in physical settings that meet all their needs as young students.</p>
<p>◇ A major strength of the elementary programs remains the support programs at the K-5 levels. Speech and other related services provide support for both special education and regular education students. It is hoped that these programs could continue and be expanded upon if the districts were to reorganize.</p>	
<p>◇ A reorganization could help to provide increased support for the arts at the elementary level.</p>	

3. The Middle School Program Offerings

The middle school leadership teams of both districts spent an evening workshop answering questions and sharing their vision for an improved middle school program if resources were available through a school reorganization. The team of each district consisted of the building principal, a representative faculty

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member, and a guidance counselor. They explained the programming available to students at each of the districts and the potential for greater opportunities for students if a reorganization were to occur between the two districts.

The data set which begin on page -118- of the DATA section of the study provide a snapshot of the programs by listing out the various program elements of each district's Middle School offerings.

Major findings from the review of the middle school (6-8) program offerings include:

- ◇ Both districts provide a strong core instructional program for middle level students and fulfill all Part 100 requirements.
- ◇ Ichabod Crane has a teaming structure for the middle school, while Schodack no longer supports financially a team approach to instruction. Ichabod Crane would like to increase teaming opportunities and Schodack hopes to be able to incorporate more teaming in the future.
- ◇ Most core staff members teach another grade level or one subject outside of their certification areas.
- ◇ Spanish and French are taught at Ichabod Crane and Spanish and Chinese are available for students at Schodack.
- ◇ Opportunities for varied music instruction, band and chorus are available to students at both districts.
- ◇ Both districts have been able to maintain after-school activity offerings for middle level students. Besides the clubs and extra-curricular offerings, both Ichabod Crane and Schodack have extended-day remediation programs.
- ◇ Intramural and inter-scholastic sports are available at Ichabod Crane and Schodack supports inter-scholastic sports programming for students.
- ◇ Both districts have been able to maintain their support services programs, including counseling, social workers, speech, OT and PT for students at the middle level. Where possible, these programs are available to general education students, as well as to IEP students with mandated requirements for services.

Themes of observations by the Community Advisory Joint Committee regarding the Middle School program offering in the two school districts:

Possible Opportunities	Possible Challenges
◇ A reorganized district with more resources could allow for a fully implemented middle level program with a team structure. CAC members believe this would benefit all students at this level and provide better opportunities for learning for this age student.	◇ Members of the CAC expressed their ideas that a major challenge will be holding on to non-mandated programming at the middle level. After school programs such as clubs and intramurals would most likely be the first to go if there are budget reductions.
◇ CAC members felt that the after school programming available to students at this level is very important. These programs will most likely be cut as they are non-mandated. A potential reorganization could not only maintain these programs but also hopefully allow for even more opportunities for students after school.	◇ Similar to the challenge above, CAC members thought that support services is another area that could be hit if there are budget reductions. In many instances, these are non-mandated services and they could be cut back to fulfill IEP requirements only and then not be as available to general education students.
◇ Support service programs are considered by members to be vital at this level. This is another area vulnerable to budget cuts. Additional resources from a reorganization could help to maintain these programs for students.	◇ Professional development for staff would be very important if the districts are reorganized. If teaming were to be fully implemented, then there would need to be sufficient training for all staff to ensure this strategy was successful.
◇ The potential for more enrichment and accelerated offerings could be available with additional resources through a school	◇ CAC members noted that work would need to be done to help parents make the adjustment. This

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reorganization.	would be especially important at this level as there tends to be less parental involvement than at the elementary level, so communication between the school and home would be critical.
◇ Increased programming for the arts and foreign language opportunities could be possible with additional resources. CAC members believe it is important to provide as many educational opportunities for students as possible as they prepare to move up to the 9-12 program.	◇ Transportation could be a challenge, especially if there are more opportunities after school and greater use of late buses to support student involvement in these programs.

4. The Secondary Program Offerings

In a panel presentation format similar to those listed above, the CAC met with the superintendent, building principal, guidance counselor, teacher representative and athletic director to review and ask questions about the secondary program. Prior to this meeting, the CAC was given data related to the respective secondary programming of the Ichabod Crane and Schodack School Districts. Members were given time in a previous meeting to review the core, special areas, support services and special education program opportunities for secondary students. Listed below are findings and observations related to the secondary programs of the two districts. The panel discussion between the staff and the Community Advisory Committee members was an opportunity for discussion about how a high school must serve pupils who have college goals initially after graduation as well as those with vocational and military goals. We asked the district leadership teams to answer questions from the CAC members as well as to address the question:

If resources were available, what added high school learning opportunities might increase the success of the current efforts to:

- ✓ *Help students have the skill sets and goal setting skills to consider a higher education opportunity after high school graduation?*
- ✓ *Help the students—who choose not to pursue higher education options after high school graduation—have marketable employability skills for the work place as a major part of their high school programs for graduation?*
- ✓ *Enlarge the range of higher education options that are academically considered for attendance by high school graduates of the two school districts?*

The data set which begin on page -123- of the DATA section of the study provide a snapshot of the programs by listing out the various program elements of each district’s secondary offerings.

Major findings of the review of the secondary program elements include:

- ◇ To date, Ichabod Crane and Schodack have been able to maintain the major elements of a comprehensive 9-12 program even in the face of continued budget cuts.
- ◇ Advanced opportunities for students, including AP courses in English, US History, and Calculus are available in both districts, as well as college course options for students.
- ◇ Spanish and French are taught at both districts and Schodack offers Mandarin Chinese via teleconferencing. Upper levels of both French and Spanish are available to students at both districts.

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- ◇ Both districts have technology programs with elective opportunities for students. Course options include manufacturing, systems design, engineering, architecture drawing and design, and CAD.
- ◇ Music opportunities in band/chorus are available at both districts. In addition, Ichabod Crane offers Music Theory I, II, III.
- ◇ Business focused courses have been reduced in both districts. Ichabod Crane offers Career and Financial Management, while Schodack has more offerings including Keyboarding, Computer Applications and Sports Marketing. Various CAC members expressed concern that basic business instruction for secondary students has eroded over the years.
- ◇ Both districts have maintained many after school club options for secondary students.
- ◇ Although there are not intramural opportunities for students in either district, both Ichabod Crane and Schodack have a wide array of interscholastic options for students to participate in throughout the school year.

Themes of observations by the Community Advisory Committee regarding the secondary program data:

Possible Opportunities:	Possible Challenges:
◇ CAC members thought a reorganized district could increase the opportunities available to students in music and the fine arts. They expressed concern that these areas could continue to be reduced due to budgetary shortfalls.	◇ There was a great deal of talk among the CAC members about the loss of identity related to combining the secondary programs. This was noted by members of the CAC as a major challenge and much work would need to be undertaken to address this issue.
◇ CAC members expressed hope that if there were to be a reorganization with new aid available, many of the courses/programs lost over the past several years could be brought back.	◇ As noted in both the elementary and middle level areas, parents would need assistance in the transition to one 9-12 program. The need for strong communication from the school to the home setting was again noted by the CAC as being extremely important if the districts were to reorganize.
◇ Expanded second language opportunities beyond French and Spanish could be available to students. If possible, it would be helpful to have some of these opportunities begin at the elementary level.	◇ Transportation was noted as a challenge and the need for more after hour's transportation for students to allow them to take part in extra-curricular activities that occur after the end of the school day.
◇ Additional funding could help support after school transportation that would make after school programs more accessible to all students. Since late buses have been cut back, this has hurt the ability of many students to take part in after hours programming.	◇ Each of the secondary programs of the districts has their own separate local traditions and customs. It will be a major challenge to integrate those traditions into a newly formed secondary school program. This was noted by CAC members as being a big hurdle to overcome if the new secondary program is to be successful
◇ A reorganization of the two districts could provide increased funding for professional development for school staff. This is an area that has been hard hit in both school districts over the past several years.	◇ CAC members from each district shared their support for their teachers and administrators. It was shared that these relationships were seen as a positive and the challenge will be to both maintain them and grow new relationships.
◇ Business and Home and Career courses have been cut back in recent years. CAC members would like to see these courses brought back and potentially expanded upon giving students more opportunities in these areas.	◇ CAC members discussed the challenge presented to students if there was now one high school. This would mean one valedictorian, salutatorian, one lead in the play, the first chair in the band, etc. There was a concern that scholarships available to students could be lessened now that there would be one high school and more students vying for a limited number of openings.
◇ CAC members would like to see expanded AP and college level course options available to students.	◇ The potential cost of textbooks and resources was discussed as a financial challenge; especially if many now being used have to be replaced in order to provide unified texts and resources.
◇ A reorganized district could help provide funding to maintain	

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current interscholastic sports opportunities and perhaps even add additional options. Also, CAC members discussed the potential for intramural options.	
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5. Interscholastic Athletics/Co-curricular/Music/Drama Offerings

Interscholastic athletics are an important aspect of a student's school life as well as a major source of pride for students and local communities. Any discussion of a reorganization of schools and its impact on athletics can be an emotional topic. Currently, both districts offer interscholastic athletic teams for both boys and girls encompassing the fall, winter and spring seasons.

The complete inventory of co-curricular, athletic and music/drama program offerings are charted starting on page -131- of the DATA section of the study report.

Both schools compete in Section II of the New York State Public High School Athletic Association; based on student enrollment, Ichabod Crane is classified as a “Class B” school and Schodack is classified as a “Class C” school. Ichabod Crane is a member of the Colonial Council, while Schodack (Maple Hill) is a member of the Patroon Conference. A reorganization of the two districts would likely result in the new school being classified as a “Class A” school for athletic competition within the Section and may require a change to a different athletic league within Section II.

Both schools offer opportunities within each sport season. However, Ichabod Crane offers more sports teams and more levels than does Schodack. During the benchmarked 2010-2011 school year, Ichabod Crane offered 23 different interscholastic sports programs at the varsity, junior varsity and modified levels (for a total of 46 teams). Schodack offered 16 different interscholastic programs and a total number of 34 teams at the various levels. (These numbers were reduced for the 2011-12 school year and may change again for 2012-13). This is exclusive of elementary programs. Within those sports teams, there is also a range of participation levels. In some cases, the level of student participation may be barely sufficient to field safely a competitive team. On other teams, the participation level is sufficient. Coaches in the sports within each district are remunerated for their services based upon contractual agreements developed through the collective bargaining process.

During the study process, the two Directors of Athletics participated in discussions with the Joint Community Advisory Committee. The Joint Community Advisory Committee and the athletic directors discussed current offerings, various participation levels, opportunities available if reorganization occurred and the challenges facing a new athletic program.

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The Joint Community Advisory Committee discussed how important it would be in a reorganized school district that some existing school traditions from the former districts be maintained while new traditions are created. They also believed it was important that additional athletic opportunities be made available to order to ensure that if any student wants to participate there is an athletic activity or team that the student can pursue. In keeping with the advice of the Joint Community Advisory Committee that new opportunities for the students are created in the athletic, music/drama and co-curricular programs, the estimated expenditure budget for a reorganized district includes an additional 15% in financial resources above the expenditures currently budgeted by the two districts separately. The two districts spent \$753,595 in 2010-2011 for interscholastic athletics, co-curricular and music/drama. 2010-2011 expenditures are used as a benchmarked because major reductions were made in athletics, co-curricular and music/drama programs for the 2011-2012 budget. Therefore, it is suggested that an additional \$113,040 be allocated in the budget of the reorganized districts.

Themes of observations by the Joint Community Advisory Committee regarding interscholastic athletics:

Possible Opportunities:	Possible Challenges:
◇ A reorganized school district with a larger student population base may be able to offer more and different athletic opportunities for its students. Depending on student interest and community interest and support, the new district may be able to add new sports teams.	◇ An increase in the number of student athletes through a larger student body creates a situation whereby fewer opportunities (or slots on a team) may exist for an athlete to participate on the team or position of his/her choice (i.e. a starting point guard in the former district may not start on a reorganized district team).
◇ The reorganized district may be able to provide junior varsity or modified teams in more sports, pending student interest	◇ With one team per sport (vs. two teams currently), it reduces the total number of slots available to play. With more student athletes to select from, the competition to be selected for a particular team may increase. Some students may choose not to participate.
◇ All students would be eligible to participate in sports that might not be offered in their current district, but are offered in the other district. (i.e. football; lacrosse; bowling; indoor track; golf; field hockey) This may particularly benefit Schodack students.	◇ The transition of supporting a different school with different loyalties may be difficult for some. The sense of identity with the local school (and community) will change. Traditional rivalries may be lost.
◇ With more sports teams available, more students might have the opportunity to play a high school sport.	◇ The current schools are accustomed to playing in Section II Class B and Class C for sectionals and the NYS tournaments. The new, larger student enrollment could place the new district in Class A. It could take time for the new athletic program to adjust to the new level of competition. It is possible that the local teams may not be prepared for the level of competition that comes with the new classification. This may be a challenge especially for those teams that enjoyed sectional and state-wide success at the classifications.
◇ Intramural sports opportunities to involve more students than those participating in interscholastic teams may be developed (elementary through high school). Currently, none exist in the two districts.	◇ Reclassified to Class A would likely require a change in sports leagues and in opponents. This also could increase the travel time for students and costs to compete with schools in other areas. This shift could eliminate some traditional school rivalries.
◇ A larger talented pool of teachers and others who are available to coach specific sports.	◇ The new district will need to set up a process to identify, select and remunerate the coaching staffs from among the current quality coaches for many of the combined sports.

FINDINGS OF THE STUDY

	One 'head coach' would be needed for a sport where two were needed prior to reorganization.
◇ Late buses Monday through Friday may enable students to participate in athletics, co-curricular activities, and music/drama as an option because of the resources available to accommodate all students of the entire district.	◇ Initial cost to replace an entirely new set of uniforms and possibly new equipment needs to be planned and phased in.
◇ The cooperative development of a new set of policies reflecting cultural issues and priorities will need to be established (i.e. policy about cutting; sportsmanship; academic eligibility; rubric for evaluation of skills).	◇ The cooperative development of a new set of policies reflecting cultural issues and priorities will need to be established (i.e. policy about cutting; sportsmanship; academic eligibility; rubric for evaluation of skills).
◇ The various town feeder programs (i.e. basketball; soccer) could be coordinated with community sponsors and coaches.	◇ The various town feeder programs (i.e. basketball; soccer) should be coordinated with community sponsors and coaches.
◇ Since each district prior to any reorganization has good quality facilities, gymnasiums and playing fields, there will be more gym space available for practices at all levels as well as good quality fields for all playing levels.	◇ The perception by some that student athletes may be chosen for teams based on 'location' in the new district.
◇ Transition to new teammates may be easy since some student athletes from the two schools currently know each other from youth leagues, and other settings.	
◇ Exposure to increased levels of competition may increase the skill levels of individual or team athletes. It may also enhance the opportunity for a continuum of consistent skill development within the athletic program from elementary school through high school.	
◇ The increased level of competition that may come from reorganizing coupled with a more favorable state building aid ratio might provide an opportunity to further enhance the athletic facilities, playing fields and equipment.	

RECOMMENDATIONS:

If the two communities affirm a reorganization referendum, the new district should immediately establish a Student Activities/Athletics/Music/Drama/Co-curricular Transition Committee to work together to plan and implement the new Student Activities Program encompassing these areas. This committee is charged with recommending to the new board of education a comprehensive student activities program along with recommendations for maintaining any school traditions from the former districts within this new district. The Committee should have broad-based composition including, but not limited to, representatives from both districts; athletic directors, coaches, advisors, directors, students, faculty, support staff, community, and alumni. The reorganized district should acknowledge that any program expansion is limited to and dependent upon availability of facilities, transportation costs, overall district budget priorities, availability of coaches, availability and cost of equipment and most of all, student interest.

MUSIC/DRAMA AND CO-CURRICULAR ACTIVITIES

Music/drama and co-curricular activities are also an important aspect of a student's school life as well as another major source of pride for students and local communities. Any discussion of a reorganization of schools and its impact in these important areas can also be an emotional topic.

FINDINGS OF THE STUDY

Many of the same OPPORTUNITIES and CHALLENGES listed above with respect to athletics are relevant and valid when viewing the music/drama and co-curricular programs. Many of the same clubs, music organizations, and honor societies exist in some manner in both of the schools. Similar to athletics, stipends are paid to faculty advisors to lead the various organizations according to collective bargaining agreements.

Themes of observations by the Community Advisory Joint Committee regarding additional opportunities and challenges for co-curricular and the music/drama programs:

Possible Opportunities:	Possible Challenges:
◇ A larger student body allows the new district to present larger and more intricate drama and musical productions with casts that are usually large enough to accommodate <i>all students</i> who wish to participate in main roles or in supportive roles.	◇ An increase in the number of students interested in music/drama and co-curricular activities through a larger student body creates a situation whereby fewer opportunities (or slots) may exist for a student to participate in the activity or role of his/her choice (i.e. there may be only one female lead in the school musical).
◇ With a larger student body, students within the reorganized district could have more clubs and student organizations from which to choose, especially if the district elects to maintain all the clubs and organizations currently existing in both of the former districts.	◇ Recruiting, selecting and remunerating the directors and advisors from among the current quality advisors for many of the clubs, organizations and music groups.
◇ A larger talented pool of teachers and others who are available to advise and organize dramas and musicals.	
◇ The reorganized district might expand any music/drama and co-curricular program dependent upon availability of facilities, transportation costs, overall district budget priorities, availability of advisors and student interest.	

6. State Student Assessment Data and High School Graduation Data

The Study Team and Community Advisory Committee reviewed a summary of student academic performance on New York State assessments to help illustrate a picture of the elementary and secondary school programs.

Both districts administered appropriate and required New York State student assessments during the school years reviewed (2006-07 through 2009-10; the later being the last year data was available from the SED at the time of the study). The assessments and data reviewed include grades 3-8 mathematics and English Language Arts (ELA) along with grades 4 and 8 science tests; High School Regents Examination Scores; High School Graduation Diplomas and Graduation Rates. Published results on all this data have been obtained from the New York State Education Department website and can be found in the DATA section of the study. Published results for 2010-2011 were not available at this time.

The summary of the student performance measures begins on page –140- of the DATA section of the study document.

FINDINGS OF THE STUDY

Comparisons of assessment results among school buildings with small student enrollments can vary depending on the year and composition of a specific grade level. It is not uncommon also, for there to be differences between schools depending on the grade level as the scope and sequence of the English, math and science curricula are delivered over a set of years.

Therefore, in reviewing the assessment results in totality, there appear to be more similarities than differences in the student assessment performance as measured by the New York State Assessment tests between the two school districts. The data consisting of the percentages of students who scored at or above a Level 3 for the four school years from 2006-07 through 2009-2010 state assessments is also charted. Level 3 is defined as “Meeting Learning Standards; student performance demonstrates an understanding of the content expected in the subject and grade level.”

In reviewing the results of the subject area *High School Regents Examinations* from the three-year period for both districts, one striking difference appears to be, on several occasions, the higher percentage of students achieving above 65% as well as achieving “mastery” (or a score of greater than 85%) among the students in the Schodack district.

Charted below are the *High School Graduation Rates* for the years 2006-2009 as recorded by the State Education Department Report Cards. They represent the percentage of grade 9 students who four years later graduated with a high school diploma. While it is difficult to compare graduation rates for two schools based on four graduation classes, it does appear that the percentage of students graduating within the prescribed four years has been higher in Schodack than Ichabod Crane in three of the last four years in which data was reviewed. The graduation rate is also increasing slightly in Schodack.

Also charted below are the *High School Diploma Types awarded by the two high schools and earned by students for the graduation years 2008, 2009 and 2010* as recorded by the New York State Education Department. In reviewing this data, it also appears that there are similarities. In all cases, a high number of students received Regents diplomas. However, it does appear that a slightly higher percentage of students in Schodack achieved a Regents diploma over this period of time.

FINDINGS OF THE STUDY

SUMMARY OF 2009-2010 PUPIL ("ALL STUDENTS") PERFORMANCE				
ASSESSMENT:	ICHABOD CRANE		SCHODACK	
	<i>% OF STUDENTS WHO SCORED AT OR ABOVE LEVEL 3</i>	<i>TOTAL TESTED</i>	<i>% OF STUDENTS WHO SCORED AT OR ABOVE LEVEL 3</i>	<i>TOTAL TESTED</i>
ENGLISH LANGUAGE ARTS (ELA)				
Grade 3	60%	133	63%	71
Grade 4	60%	145	60%	65
Grade 5	52%	156	47%	78
Grade 6	50%	134	72%	76
Grade 7	52%	161	54%	79
Grade 8	66%	148	62%	77
HS Comprehensive English	<i>% OF STUDENTS WHO SCORED AT/ABOVE 65%/85%</i>	<i>TOTAL TESTED</i>	<i>% OF STUDENTS WHO SCORED AT/ABOVE 65%/85%</i>	<i>TOTAL TESTED</i>
	91%/43%	214	89%/40%	85
MATHEMATICS				
Grade 3	61%	137	76%	71
Grade 4	68%	145	65%	65
Grade 5	63%	157	69%	78
Grade 6	57%	136	76%	76
Grade 7	79%	161	81%	77
Grade 8	75%	147	69%	77
Integrated Algebra	<i>% OF STUDENTS WHO SCORED AT/ABOVE 65%/85%</i>	<i>TOTAL TESTED</i>	<i>% OF STUDENTS WHO SCORED AT/ABOVE 65%/85%</i>	<i>TOTAL TESTED</i>
	76%/17%	206	96%/35%	110
Geometry	68%/16%	196	74%/18%	85
SCIENCE				
Grade 4	<i>% OF STUDENTS WHO SCORED AT OR ABOVE LEVEL 3</i>	<i>TOTAL TESTED</i>	<i>% OF STUDENTS WHO SCORED AT OR ABOVE LEVEL 3</i>	<i>TOTAL TESTED</i>
	95%	144	94%	65
Grade 8	90%	144	91%	76

REGENTS EXAMINATION	YEAR	NUMBER TESTED		% AT OR ABOVE 55		% AT OR ABOVE 65		% AT OR ABOVE 85	
		ICH	SCHO	ICH	SCHO	ICH	SCHO	ICH	SCHO
ENGLISH	07-08	164	95	96	99	90	91	46	41
	08-09	169	98	96	97	88	94	49	43
	09-10	218	87	95	91	90	89	42	40
MATH A	07-08	NA	NA	NA	NA	NA	NA	NA	NA
	08-09	NA	NA	NA	NA	NA	NA	NA	NA
	09-10	NA	NA	NA	NA	NA	NA	NA	NA
MATH B	07-08	110	63	93	94	87	83	39	27
	08-09	90	72	94	90	84	78	27	25
	09-10	6	6	33	100	17	83	0	0
ALGEBRA	07-08	171	36	87	97	82	92	9	11
	08-09	224	100	90	100	76	97	13	28
	09-10	234	110	89	99	78	96	25	35
ALGEBRA 2/TRG	07-08	NA	NA	NA	NA	NA	NA	NA	NA
	08-09	NA	NA	NA	NA	NA	NA	NA	NA
	09-10	95	57	85	81	80	70	27	28
GEOMETRY	07-08	NA	NA	NA	NA	NA	NA	NA	NA
	08-09	165	64	85	95	67	84	16	27
	09-10	197	85	84	92	68	74	16	18
GLOBAL HISTORY	07-08	199	101	89	98	81	95	33	60
	08-09	210	86	92	95	84	94	35	63
	09-10	203	114	92	91	83	86	37	46
US HISTORY	07-08	170	67	95	100	92	94	59	58
	08-09	160	95	98	100	95	98	60	74
	09-10	182	83	97	95	87	93	45	55
LIVING ENVNT	07-08	170	96	96	99	87	95	40	58
	08-09	174	91	98	97	93	96	37	57
	09-10	187	107	97	98	91	93	38	40

FINDINGS OF THE STUDY

REGENTS EXAMINATION	YEAR	NUMBER TESTED		% AT OR ABOVE 55		% AT OR ABOVE 65		% AT OR ABOVE 85	
		ICH	SCHO	ICH	SCHO	ICH	SCHO	ICH	SCHO
EARTH SCIENCE	07-08	182	76	85	96	70	89	24	42
	08-09	196	112	92	98	83	93	39	39
	09-10	195	94	90	95	79	91	35	37
CHEMISTRY	07-08	118	65	97	95	96	88	21	22
	08-09	97	74	99	99	91	89	22	30
	09-10	80	62	95	92	78	74	5	18
PHYSICS	07-08	60	34	98	94	92	91	45	41
	08-09	56	26	100	96	91	88	36	42
	09-10	31	39	100	100	94	97	48	38
SPANISH	07-08	79	29	95	100	91	100	56	79
	08-09	88	46	99	100	99	100	35	70
	09-10	75	38	99	97	93	97	32	61
FRENCH	07-08	30	17	97	100	97	100	43	59
	08-09	13	10	100	100	100	100	92	50
	09-10	26	10	100	100	100	100	46	70

Charted below are the high school diplomas awarded by the two school districts from 2008-2010 as recorded by the State Education Department Comprehensive Assessment Reports.

YEAR OF GRAD	DIPLOMA TYPE	ICHABOD CRANE	SCHODACK
2008	TOTAL GRADUATES	151	76
	ADVANCED REGENTS	89	45
	REGENTS	132	70
	IEP	4	1
	APPROVED HS EQUIVALENT PREP	1	0
2009	TOTAL GRADUATES	159	92
	ADVANCED REGENTS	86	42
	REGENTS	137	84
	IEP	4	1
	APPROVED HS EQUIVALENT PREP	4	0
2010	TOTAL GRADUATES	155	93
	ADVANCED REGENTS	84	54
	REGENTS	141	91
	IEP	4	0
	APPROVED HS EQUIVALENT PREP	2	0

Charted below are the high school graduation rates for 2006-2009 as recorded by the State Education Report Cards Accountability and Overview Reports. The rates represent the percentage of grade 9 students who four years later graduated with a high school diploma.

**FINDINGS OF THE STUDY
HIGH SCHOOL GRADUATION RATES ***

YEAR **	COHORT COUNT	ICHABOD CRANE	SCHODACK
2006	ALL STUDENTS	193	96
(2002 COHORT)	GRADUATION RATE %	84	84
2007	ALL STUDENTS	179	116
(2003 COHORT)	GRADUATION RATE %	82	87
2008	ALL STUDENTS	177	87
(2004 COHORT)	GRADUATION RATE %	81	86
2009	ALL STUDENTS	180	101
(2005 COHORT)	GRADUATION RATE %	81	91

The important aspect of reviewing any student performance measures is to provide data for a school district to determine an instructional delivery plan the school can implement to help all students achieve at least a level 3 or 4 on the state assessments and to achieve a high school diploma in the prescribed four years. The assessment data snapshot from the results and the graduation rate data were the springboard for the Community Advisory Joint Committee and the school district program representatives to discuss and list other instructional programs not now in place that could help increase the number of students who achieve at least a 3 or 4 on the state assessments and increase the numbers of students who complete high school. The discussion with staff helped the Community Advisory Joint Committee to formulate their vision of the elementary and secondary programs if resources were available through a reorganization of the two districts into one.

7. Regional Sharing with Other School Districts

It is possible that the new district if authorized may purchase a similar total of services from the Questar BOCES as well as through cross-contracts with other BOCES in the state. Many of the specific purchased services may be the same. For example, very few school districts on their own can afford the state-of-the-art Career and Technical instruction available cooperatively with other school districts through the BOCES. It is possible that the BOCES may turn to the new district to rent any available classroom space in order to provide regional programming in the buildings of the newly organized district. The newly formed district may have a more comprehensive set of programs that can be a major asset in integrating special needs pupils in skill areas they can excel in like any other pupil.

Special Education Services:

It is possible that the newly organized school district may purchase different shared services for special needs pupils because the new district may have enough students with a similar disability to provide the

FINDINGS OF THE STUDY

service at the home school with home school staff. Charted below are the numbers of special needs students served within the home schools and served outside the home schools as of January, 2012.

Special Needs Program K-12 As of JANUARY 2012	Ichabod Crane		Schodack	
	#served in the home district by the home district	# served outside the home district (by others, not the home district) -- pupils that may be in home district classrooms, but are enrolled in a regional program provided by BOCES.	#served in the home district by the home district	# served outside the home district (by others, not the home district) -- pupils that may be in home district classrooms, but are enrolled in a regional program provided by BOCES.
12:1:1 (15:1:1)	95		77	
12:1:2				2
8:1:1	12	9		
8:1:2				4
9:1:2				1
4:1:2				2
6:1:1	3	6		2
6:1:1(1) class				
6:1:2				2
6:1:3				1
Residential 12:1:4 and 6:1:1 autistic	29	1	17	4
Emotionally, intellectually, learning, multiple disabled	205		8	6
Pre-school spec. needs		34		

ANALYSIS BY THE COMMUNITY ADVISORY JOINT COMMITTEE ABOUT HOW TO USE THE EXISTING BUILDINGS WITH A POSSIBLE REORGANIZATION OF THE TWO DISTRICTS INTO ONE

D. Building Use Options Identified by the Community Advisory Joint Committee

Over a series of three Community Advisory Joint Committee meetings, the members representing the two school districts identified the following options for use of the existing school buildings to deliver the program if a reorganized district is approved by the communities. The options defined by the Joint Committee are based upon the mid-range enrollment projections calculated for five years from now; the pupil capacities defined by the pupil capacity analysis (page -85- in the DATA section of the study); the class size goals of the two districts; and initial ideas of the Joint Committee of a future program vision of the elementary and secondary curricula that a reorganized school district could implement and deliver. Scenario 3 listed and shaded below is suggested by the study as the primary option for the possible new reorganized school district.

**FINDINGS OF THE STUDY
 OPTIONS IDENTIFIED, DISCUSSED, AND ANALYZED BY THE COMMUNITY ADVISORY
 JOINT COMMITTEE TO DELIVER THE PROGRAM IN A REORGANIZATION OF THE
 TWO DISTRICTS INTO ONE**

SCENARIO 1
<i>K-4 in each current school district community; A 5-6 middle school and a 7-8 middle school on existing Schodack campus; A 9-10 and a 11-12 high school program on existing Ichabod Crane campus</i>
SCENARIO 2
<i>K-4 in each current school district community; A 5-8 middle school at the current Ichabod HS; A 9-10 and a 11-12 high school program on the existing Schodack campus</i>
SCENARIO 3
<i>K-4 in each current school district community; A 5-6 middle school and a 7-8 middle school on existing Schodack campus; 9-12 high school program at the current Ichabod HS</i>
SCENARIO 4
<i>K-2 in each current school district community; A 3-5 elementary School; A 6-8 middle School; A 9-10 and a 11-12 high school program</i>
SCENARIO 5
<i>A K-2 elementary school; A 3-4 elementary School; A 5-6 middle School; A 7-8 middle School; A 9-10 and a 11-12 high school program</i>
SCENARIO 6
<i>A K-2 elementary school; A 3-5 elementary School; A 6-8 middle School; A 9-10 and a 11-12 high school program</i>

The Community Advisory Joint Committee discussed the scenarios with the leadership teams from each district in the context of opportunities and challenges associated with each scenario. Based on the discussion of the Community Advisory Joint Committee, the Study Team identifies **Scenario 3**--- *Pre-K through grade 4 in Ichabod Crane and Schodack; 5-8 in Schodack; 9-12 in Ichabod Crane* ---as the scenario which the study should suggest as the Primary Option to deliver the Pre-K through grade 12 program if a reorganization was approved by the communities.

Summarized below are opportunities and challenges of the prime building use option heard discussed by the Joint Community Advisory Committee and the leadership teams from both school districts.

*Pre-K through grade 4 at Ichabod Crane campus and Schodack; 5-8 at Schodack campus;
 9-12 at Ichabod Crane*

OPPORTUNITIES
Youngest of students served in the traditional neighborhood schools approach as is currently provided without having to adjust boundaries where K-4 pupils currently attend school; elementary attendance zones can remain coterminous with current school district boundaries of the two schools until such time the new district another pattern, if any, that could advantage service to K-4 pupils.
Increased program opportunities at all grade levels. Possibility of languages at the elementary level while still providing honors / AP courses with maintainable classroom enrollment.

FINDINGS OF THE STUDY

Maintain and improve strong elementary programs by having the capability to keep current class size goals and provide a consistency across grade levels with curriculum mapping and research based testing measurements
Examining the state mandates for middle schools and adapting to a new environment that allows for enhanced opportunities above and beyond the mandates.
The 7-8 building will allow the development of a true middle school that uses teaming, an integrated curriculum, and techniques that focus on learning and adolescent development. Improved laboratory classroom for students in grades 7 – 8.
The 5-6 building will allow the development of a middle school delivery model for this age student that uses teaming, an integrated curriculum, and techniques that focus on learning and adolescent development. Improved laboratory classroom for students in grades 5-8. Builds upon the success and best practices both districts have learned/developed in historically delivering a middle school model to grades 7 and 8.
Potential for a 6 th grade transition / academy by placing all sixth graders in one building and addition to their educational experience through a new model that encourages innovation and critical thinking while preparing them for middle school and high school experiences.
Possibly use some unassigned building capacity for the potential of STEM or International Baccalaureate programs for neighboring school districts – regionalized high school experience.
Increased opportunities to participate in more co-curricular and athletic opportunities.
Communication with BOCES and local colleges to create regional opportunities that inform and encourage understanding of emerging technologies that support global development in the capital region.
Centralized Administrative Office – combination of Superintendent, Business Official, Curriculum, Special Education, Transportation, Buildings and Grounds, and Athletics – more efficiencies
Renewed energy and enthusiasm through shared professional development. Larger departments with different perspectives.
Greater opportunities for Highly Able Learner (HAL) more than one student able to take advantage of opportunities.
Addition of pre-k program at both elementary schools.
Vertical and horizontal alignment of the curriculum is more possible – consistency. Completeness, and definition of mastery steps for pupils will be enabled and possible because there will be enough cohort of professionals working together to share best practices with instructional decision making.
Clear understanding of the objectives by all stakeholders of the possible merger – maintain and enhance educational opportunities for all students while being financially responsible.
CHALLENGES
The high school will likely be at capacity initially. Science labs and gymnasium space will need to be carefully and creatively scheduled.
Transporting students between existing buildings; keeping transportation time within 45 minute travel on a bus. Collaboration between district transportation supervisors and Transfinder once final configuration is determined.
Providing district wide professional development opportunities for all grade and building level faculty to ensure common core is being delivered consistently and efficiently with positive results.
Examining the state mandates for middle schools and adapting to a new environment that allows for enhanced opportunities above and beyond the mandates.
Communication with BOCES and local colleges to create regional opportunities that inform and encourage understanding of emerging technologies that support global development in the capital region.
Understanding that not all students may not have the opportunity to be ‘the star’ to shine on the stage, court, or playing field.
Changing the way we’ve done things for years – purchasing, professional development, instruction, all aspects of change. Reason as to why it is better for students.
Merging of traditions between school districts and accepting change. Preserving core values and beliefs of both districts.
Requires coordination of start and end times of the various buildings and a transportation plan to accommodate the programs and grade configurations.
Deployment of best available talent to the grade level/building that best support students.
Major need for transition planning between faculty and support staff.
Multiple contracts and expectation of assignment time – faculty and support staff.
Clear understanding of the objectives by all stakeholders of the possible merger – maintain and enhance educational opportunities for all students while being financially responsible.

E. School Day Time Schedule and Pupil Transportation

After discussing various ways to organize the grade level configurations in the current school buildings, the Community Advisory Joint Committee turned to analyzing pupil transportation. The Community Advisory Joint Committee in summary suggested the following assumptions that should guide decisions

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about school day times, transportation times, and bus runs/routing if the two districts did reorganize into one.

Assumptions:

- ✓ All K through grade 4 pupils attend the elementary school within the original school district 'attendance zone'. However, parents who wish to have their elementary children attend an elementary school of the newly reorganized school district that is **closer** to their home may request that attendance at their discretion.
- ✓ The goal is that no child is on a bus longer than 45 minutes.
- ✓ Smaller (less than 66 passenger) buses will probably be used to transport pupils who currently live at the most outer limits of the current school district geographic boundaries.
- ✓ All pupils receive bus transportation in the two districts currently. The assumption is that the same service is provided in a reorganized school district. The current practice of door-to-door and/or centralized pick up points is expected to continue contingent on pupil safety considerations and characteristics at specific locations.
- ✓ It is expected that the reorganized school district continues the current practice of helping families as well as they can with transportation to day care locations depending upon the number of available seats on specific bus routes.
- ✓ It is suggested that it be assumed for *initial* planning that existing routes with existing drivers be provided for at least the first year of the reorganized district. If there is a positive vote to reorganize in the fall-winter of 2012-2013, there may be time before July 1, 2013 to carefully revise some existing routes to routes that would 'cross' old district boundaries to enable less travel time and more efficient use of the buses. Starting for year 2, it is suggested that the reorganized district formally study if there can be some combining of routing where boundaries of the two attendance zones are very close to enable time and financial efficiencies with transportation.

CURRENT PERSONNEL DATA AS REVIEWED BY THE COMMUNITY ADVISORY JOINT COMMITTEE

F. Profile of the Major Elements of Labor Contracts in Place in the Two Districts

Instructional Staff Contracts

The instructional staff benefits in the two districts are significantly similar. For example:

The districts have similar length of days (7 hours) and have comparable language regarding vacancies. They also have similar language regarding transfer situations. Ichabod Crane has 185 contract days and Schodack 189. The districts have similar language regarding sick leaves and accumulated leaves (14 a year for Ichabod Crane and 15 for Schodack with 200 and 250 able to be accumulated respectively.) Both have similar child rearing leave language and Ichabod Crane has 3 days per year designated for personal leave and Schodack allows 4.

The salary structures of Ichabod Crane and Schodack are also closely aligned. The similarity in the salary schedules is an asset for the two districts if they were to merge. The negotiations for new contracts in a

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reorganized district can be a complicated process that must be collaboratively accomplished. Like negotiations in most districts, the major elements consisting of salary and health insurance benefits are often the most difficult to finalize. In addition, currently both Ichabod Crane and Schodack have the same health insurance plans. There are differences in how the health plans are administered and the percentages of premium sharing costs in each of the districts.

Instructional Staff Salary Structures of the Two Districts

Ichabod Crane and Schodack have similar rates of pay for instructional staff. The beginning pay of the two districts is within two thousand-five hundred (\$2,500) dollars and then the gap closes at the 5th and 10th years to within \$500 at the 5th year and \$1,200 at the 10th.

	Ichabod Crane	Schodack
Starting Salary w/MA	\$44,194	\$41,717
Beginning 5 th year	\$47,499	\$47,661
Beginning 10 th year	\$53,875	\$55,095
Beginning 15 th year	\$62,087	\$62,527
Beginning 20 th year	\$72,726	\$69,959

Instructional Support Staff Contracts

The instructional support staff benefits in the two districts are significantly similar. For example:

12 month employees receive 4 personal days per year in Ichabod Crane, 5 in Schodack; bereavement leave benefits are similar with 5 per year in both districts; 12 month employees receive 12 paid holidays days at Ichabod and 13 per year at Schodack; 12 month employees at Ichabod receive 10 days vacation during the 2nd year, 15 days during the 6th year and 20 days during the 14th year of employment; 12 month employees at Schodack receive 5 days vacation after one year, 10 days after two, 15 days after 7 years and 20 days after 12 years; vacancy language is very similar and layoff/recall is based upon seniority in both Ichabod Crane and Schodack.

Wage/Salary Benefits

The rates of pay for support staff are similar between the two districts.

Sample Salaries for Instructional Support Staff/Hourly Rates of Pay based upon 2011/2012 school year. Rates of pay listed are starting rates.		
	Ichabod Crane	Schodack
Cleaner	\$16.25	\$15.57
Custodian	\$17.00	\$17.34
Head Custodian	\$20.47	\$20.42
Secretary	\$16.83	\$17.74
Teacher Aide	\$16.27	\$13.87
Bus Driver	\$21.88	\$20.51

Health Insurance Benefits

Both districts provide the Blue Shield Secure Blue Preferred PPO plan. There are substantial differences in the rates of employee contribution; 9% of the premium at Ichabod Crane (10% for support staff) and

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15% at Schodack are the rates of employee premium contribution. There is similar contract language for opt-out plans and both districts offer flex plans. Each district provides money towards dental premiums (\$900 at Ichabod Crane and \$300 at Schodack). Both districts have potentially costly retiree plans. Employees who work for at least 10 years in Ichabod Crane prior to retirement receive 90% of the cost of the insurance premium towards an individual plan and 50% for family coverage in retirement. At Schodack, after 15 years of continuous service, the District contributes the same percentage rate as contributed by the District as of the date of retirement. Presently, 85% of the health insurance premium cost is paid by Schodack for both individual and family plans.

Instructional Staff	Ichabod Crane	Schodack
Benefit Plans	Blue Shield Secure Blue Preferred PPO	Blue Shield Secure Blue Preferred PPO
Employee Contributions	Unit member pays 9% of the premium	Unit member pays 15% of the actual premiums for individual, 2 person or family
RX Co-Pays	5/10/25 with two co-pays for mail order of a 90 day supply	
Opt Out Plan	\$1,000 individual, \$1,500 two person and \$2,000 family	\$1,175 individual, \$3,000 two person and \$3,200 family
Retiree Contributions	Minimum 10 consecutive years in the district, 90% individual is paid and 50% family	Minimum 15 years consecutive years in district, same percentage contributed by district according to contract as of the date of retirement

The health insurance benefit for instructional support staff has different characteristics.

Support Staff	Ichabod Crane	Schodack
Benefit Plans	Secure Blue Preferred PPO 812	Northeastern NY Secure Blue Preferred PPO
Employee Contributions	10% individual, two-person or family	15% individual, two-person or family
RX Co-Pays	\$5 generic, \$10 name brand and \$0 mail	
Opt Out Plan	\$750 single plan or \$1,000 for two person or family	\$450 single plan, \$950 for two person and \$1,000 family
Retiree Contributions	After 10 consecutive years immediately prior to retirement, 100% paid for individual and 50% for family	At least 15 years of employment and going directly to retirement w/NYS pension, 85% paid by the district

With or without a merger of the two school districts, it is likely that the increasing cost of health insurance and the increasing cost for retiree health insurance will be topics for ongoing collaborative discussion in contract negotiations for some time to come.

There is one other opportunity/challenge to note regarding the contracts of the two districts. The incentive aid that will go to the two districts should they centralize may help to support and increase programs for students, improve the long term fiscal stability of the district, and help to moderate the tax levies for the taxpayers of the new school district. Additionally, part of the new incentive aid is used to help create new labor contracts with each employee labor unit. There will be many conversations between the labor units and the board of education during the negotiation process relative to new language, benefits, and

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salaries. At this time of economic distress nationally, the negotiations process should be an open dialogue between all parties to craft reasonable agreements that are balanced in all areas. As with many aspects of our economy, “business as usual” actions probably will not ensure a viable long-term financial plan for the school district or for the employees. In previous school district reorganizations in the 1980’s and 1990’s the practice of ‘leveling up’ salary amounts among existing salary schedules was common and the main focus of establishing new contracts with the new school district. The practice of “leveling up” that has taken place in previous mergers is not required as a starting point for negotiations. It is suggested that the process of coming to collaborative agreement on new contracts for a reorganized district be globally focused on how to *balance all elements* of remuneration including health insurance benefits, leave time, salary and other items that have specific dollar benefits for employees.

A profile of the major elements of the instructional and instructional support labor contracts starts on page –146- of the DATA section of the study.

The DATA Section starting on page –194- includes a *Q and A* about the process with regard to personnel when a school district reorganization occurs through centralization. The process is guided by New York State law, case law, and the Public Employee Relations Board (PERB) decisions. If the communities approve of a reorganization of the school districts, the employee groups then choose what bargaining agents will represent them. This is an employee responsibility and the Board of Education is not involved. Once the new bargaining units identify their bargaining agents, then the agents and the new school district must make a good faith effort to negotiate new collective bargaining agreements. The new negotiated agreements do not have to be in place by July 1, 2013. The existing agreements specific to each school district are administered until a new contract is agreed upon and ratified.

G. Average Total Full Time Equivalent Personnel Expenditures Across the Two School Districts Benchmarked to the 2011-2012 School Year

The study uses the average and median Full Time Equivalent (FTE) Costs for each segment of employees employed by the two school districts in 2011-2012 to estimate possible future personnel costs for the first year of a newly organized school districts given the instructional program suggested by the Study Team with the help of the Community Advisory Joint Committee. It is important to note that the full time equivalent costs reported equals the grand total of salary, PLUS employer FICA costs, employer health insurance costs, employer retirement costs, and any other benefits (if any). Please note that the differences in cost per FTE per staff category is primarily due to the longevity differences of various FTE’s at each respective school district; the different retirement ‘tier’ an FTE falls under based on what state ‘tier’ was in place at time of hire; along with contractual pay guidelines.

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Summary of FTE Personnel Costs Benchmarked to 2011-2012

STAFF SEGMENT	Average FTE Cost
Pre-K through grade 6 certified teachers (including counselors, nurses and similar others):	\$79,355
Grade 7-12 certified teachers (including counselors, nurses and similar others):	\$83,417
Grades K-12:	
Teacher Assistants (certified)	\$36,726
Teacher Aides (civil service payroll)	\$23,600
Grades K-12:	
OT/PT (civil service payroll)	\$37,227
Social worker (civil service payroll)	
Nurse (civil service payroll)	\$49,413
K-12 certified administrators:	
Include all district administrators including the business official if she/he serves in a civil service position	\$142,528
On Civil Service payroll: (CONSIDERED FTE'S)	
Supervisors of any support function	\$99,235
Bus drivers	\$32,983
Bus aides	\$30,315
School lunch workers	\$13,400
Operations and Maintenance workers	\$52,110
Secretaries	\$50,122
Business Office staff <u>other</u> than secretarial OR business official	\$67,985
Technology support staff	\$73,710
CONSIDERED HOURLY EMPLOYEES ON CIVIL SERVICE PAYROLL	
Bus drivers	\$16.68
Bus aides	\$12.35
School lunch workers	\$18.63
Part-time cleaners	

A profile of the number of staff in each segment by each district and the total expenditure in 2011-2012 of each segment starts on page –157-- of the DATA section of the study.

H. Full Time Equivalents of Staff Who Have Left the Districts for All Reasons Except Reduction in Force for the School Years 2007-2008 Through 2010-2011

The combining of the pupils from two separate school districts to serve as one set of clients by one district inherently creates efficiencies in how human resources are able to be utilized to serve students. For example, going from two high schools to one allows better scheduled use of the talents of the instructional staff *and* adherence to the class size goals set by the district.

An *economy of scale* is usually achieved with a reorganization of school districts. As such, financial savings are often achieved by not having duplication and redundancy in program offerings. Therefore, student program elements that do not exist now are usually possible through school district reorganization using *existing* funds because duplication by combining two districts is addressed in a reorganization. The reorganization of the two school districts into one will likely include additional student program elements

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and reduction in force of some employees and/or changes in how current employees serve their pupils now and/or the hiring of some different staff with different skill sets.

However, the implementation of economies of scale with regard to staffing levels and the implementation of student program elements that do not exist now in the two separate school districts is a planned, careful process for a reorganized school district which can take between 12 to 18 months to fully take place.

Charted below are the total numbers of various segments of staff of the two separate school districts who have left both districts for all reasons not including reduction in force by either school district over the past four years from 2007 – 2011. Over the past four years, 166.3 instructional and support staff FTE’s have left the two districts.

STAFF SEGMENT	<i>TOTAL STAFF FTE’S OVER 4 YEARS WHO HAVE LEFT ONE OF THE TWO SCHOOL DISTRICTS (‘REDUCTION IN FORCE’ EMPLOYEES NOT INCLUDED)</i>
Pre-K through grade 6 certified teachers (including counselors, nurses and similar others)	24.3
Grade 7-12 certified teachers (including counselors, nurses and similar others):	55
Grades K-12:	
Teacher Assistants (certified)	15
Teacher Aides (civil service)	2
Grades K-12:	
OT/PT (civil service)	1
Social worker (civil service)	
Nurse (civil service)	2
K-12 certified administrators:	6
Civil Service:	
Supervisors of any support function	1
Bus drivers	17
Bus aides	7.5
School lunch workers	1.5
Operations and Maintenance workers	14
Secretaries	11
Business Office not secretarial	8
Technology support staff	1

The *program roadmap* described by the study has more FTE instructional staff estimated for the reorganized district than exist in total in the two separate school districts as of January 2012. However, the certification of the projected FTE’s may or may not exist currently in the two separate school districts. Therefore, there may be some current FTE’s whose certification may not be congruent with the program offerings suggested by the *program roadmap*.

The normal historical pattern of employees who leave the employment of the two districts in total suggests that it is quite possible that normal attrition will allow for only a few employees, if any, to

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actually have to experience reduction in force if a reorganization was authorized by the two communities which implements the student program elements outlined in the ‘reorganization roadmap’ suggested by the study.

A profile of the number of each staff segment by each district who left their district is on page –160- of the DATA section of the study.

What might a ‘reorganization’ roadmap look like?

Where would the students go to school?

I. Suggested Prime Building Use Plan to Implement the Pre-K through 12 Program if the School Districts Reorganized into One

The SES Study Team recommends the following use of the school buildings to deliver instruction as discussed and reviewed by the Joint Community Advisory Committee and leadership teams.

Two Pre-K-4 elementary attendance zones are drawn with at least one K-4 school within what is now each school district. One grades 5-6 upper elementary school; one grades 7-8 middle school; and one high school grades 9-12.

Grade Level:	School:	School Building Pupil Capacity:	MID RANGE Estimated Enrollment for 2013-2014:	MID RANGE Estimated Enrollment for 2015-2016:
Pre-K-4	Castleton Elementary	442 pupils	320 K-4; Plus 1 classroom for pre-K, 18; total of 338— 76.5% of available capacity	311 K-4; Plus 1 classroom for pre-K, 18; total of 329— 74.4% of available capacity
		Pre-K; 18 full day or 36 half day pupils or combination		
Pre-K-2	Primary Elementary (in the current Ichabod Primary School)	512 pupils	415 K-2; Plus 2 classrooms for pre-K, 36; total of 451— 88% of available capacity	370 K-2 <i>Plus 2 classrooms for pre-K, 36; total of 406— 79.3% of available capacity</i>
		Pre-K; 36 full day or 72 half day pupils or combination		
Grades 3-4	Elementary (in the current Ichabod Middle School)	794	277 grades 3-4; 34.8% of available capacity	299 grades 3-4; 37.7% of available capacity
Upper Elementary Grades 5-6	Upper Elementary (in the current Schodack Middle School building)	445 plus 40 using what is now the current district office space; 485	434 grades 5-6; 89.9% of available capacity	405 grades 5-6; 83.5% of available capacity
Middle School Grades 7 and 8	Middle School (in the Current Schodack High School)	445	425 grades 7-8; 95.5% of available capacity	438 grades 7-8; 98.4% of available capacity
High School Grades 9 through 12	High School (in the current Ichabod Crane High School)	945*	945 grades 9-12; 100% of available capacity	877 grades 9-12; 92.8% of available capacity

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*Please note that the pupil capacity of the existing high school recorded in the chart includes three elements:

1. The pupil capacity as defined by the State Education Department for senior high schools having 23 or more teaching stations *adjusted downward to reflect the class size local goal of 25 pupils per secondary class*. Pupil Capacity by SED guidelines: 812; *Pupil Capacity reflective of local class size guidelines: 750*.

Plus:

2. The pupil capacity for the use of the cafeteria during non-lunch times for supervised study hall. SED guidelines calculate pupil capacity for supervised study hall in a cafeteria to be based on the area of the cafeteria divided by 16.5 sq. ft times .7. In addition, the pupil capacity for the use of a cafeteria to provided supervised study hall *throughout the instructional day* is limited to 40% times the pupil capacity of the interchangeable subject classrooms in the building.

The use of the cafeteria for supervised study hall recognizes the implementation of the instructional program such that instructional classrooms for the most part will be used for subject direct instruction as opposed to sites for supervised study halls. Such a common program practice of using the cafeteria adds 173 more capacity to the high school. Therefore, the use of the cafeteria for supervised study hall provides a total high school pupil capacity at the Ichabod Crane High School Building of 923.

Plus:

3. 22 pupil capacity from an instructional room that is now rented to BOCES. The result is that the high school capacity is **945**.

FINDINGS AND CONSIDERATIONS WITH REGARD TO THE USE OF FACILITIES:

- ✓ The six school buildings with the grade level configurations proposed have sufficient pupil capacity to accommodate the *mid* enrollment projection estimated for five years from now and to have unassigned capacity to allow for flexibility of delivery of the program except for the high school program initially. If the districts reorganized in 2013-2014, it is likely that the high school will be at 100% capacity as per State Education Department definitions of pupil capacity *adjusted downward* to reflect the local value of class sizes at 9-12 limited to 25 pupils per core subject class.
- ✓ In addition, there looks to be ample space in the buildings designated to serve Pre-K through grade 6 to rent to the BOCES to serve special needs pupils on a regional basis. There may be one or two instructional spaces that might be available for rent in the middle and high schools for the newly organized district on a case-by-case, year-to-year basis.
- ✓ It is suggested that the new district house the central administration services in the current space allocated in the Ichabod Crane Middle School Building. The current space for district office functions at the Schodack high school would be reclaimed for pupil instruction purposes.
- ✓ Even though it is likely that the grades 3-4 building proposed to serve Ichabod Crane attendance area pupils will have ample unused pupil capacity initially, it is strongly suggested that the new district see this as an asset for the new school district. For example,
 - ◇ If a surge in the economy, housing and jobs occur, the new district will have instructional space 'ready-to-go' to use to plan how to deal with any possible new enrollment.

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- ◇ The district has marketable space to rent to the BOCES for regional programming in a functioning school with a grades 3-4 curriculum.
 - ◇ The district has in-house space to use conveniently for staff development; for partnerships with higher education institutions to deliver graduate courses regionally to adults; for partnerships with other municipalities and service agencies to better serve the community by housing programs in the building.
- ✓ When referencing facilities in general throughout this study, it is suggested that the newly-organized district immediately commence (within the initial months following an affirmative public vote) a comprehensive evaluation and study of all school buildings to develop a long-range facility plan including how to address the items for normal attention in the Conditions of Existing School Buildings Report. Even though, initially, it is estimated that the high school will be close to capacity, it is able to accommodate the anticipated enrollment. The current school building resources of both districts are such that the study suggests no major facility renovations, new facility construction, or rented space are necessary to deliver the program to the anticipated enrollment of the newly organized single school district.

What might the program for students look like?

J. Suggested Breadth of Student Program Elements if Reorganization of the Two School Districts into One is Approved by the Communities

Over a series of meetings the Community Advisory Joint Committee met with teams consisting of teachers, counselors, principals and the superintendents to discuss and analyze the current elementary, middle level and secondary program offerings at both school districts. At each of the meetings, the staff representatives answered questions from Joint Community Advisory members about the delivery of their instructional programs. As part of those conversations, school representatives were asked to respond to the following question:

“What are specific ideas and examples about enhanced (elementary/secondary) program/learning opportunities that are possible for the pupils of the two districts if resources were available through reorganization?”

From the responses to the question by the different sets of school staff (superintendent, principals, elementary and secondary teachers, and guidance personnel) the Community Advisory Joint Committee heard what district staff believed could be program elements to address the needs of the students of the two school districts if a reorganization did occur.

The two Boards of Education appointed members to the Advisory Joint Committee who are representatives of the diverse stakeholder groups of each community. The Study Team asked all of the members of the Joint Committee in a large group discussion to answer the following question:

What do you believe could be program enhancements if the two districts were to reorganize?

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The Study Team listed the answers from each of the Joint Committee members. The Joint Committee was not asked to form a consensus about the items. The purpose of listing the student program elements that the Committee members suggested was to help the Study Team prepare a suggested “*What if*” *Program and Staff Picture*” as part of the *possible reorganization roadmap* in the study report. The Study Team believes that the study should not just suggest a student program scope for a potential reorganized district without a local community context which the Joint Committee gave the study. As ‘guest outsiders’ the Study Team listened to and recorded the perceptions of the diversely representative community members serving on the Joint Committee. They helped to give insights about what the communities value about possible opportunities that should be available through the public school system. If a reorganization of Ichabod Crane and Schodack is approved by both sets of community voters, the specific program elements of a reorganized district is the decision of the newly elected Board of Education for the newly organized school district. Listed below (not in any rank-order or priority) are all of the student program elements for a reorganized district suggested by the various Joint Advisory Committee members appointed to help with the feasibility study.

PRE-K –GRADE 4

- Retain at least the program for 2011-2012
 - Teacher assistance/aides; at least one per grade level
 - Provide a pre-K program
 - Foreign language
 - Chorus, art, music full year
 - Psychologist
 - Social worker
 - Added co-curricular
 - Update technology, inservice and support
 - Counseling
 - Enough rooms so no subject ‘on a cart’
- ### **GRADES 5-6:**
- Retain at least the program for 2011-2012
 - Foreign language
 - Teaming approach
 - Teacher assistance at least one per grade level
 - Psychologist
 - Social worker
 - Added co-curricular
 - STEM; technology FTE
 - Update technology, inservice and support
- Start Part 100 requirements like foreign language, home and careers, technology
 - Counseling
 - ‘Floater’ nurse for the district as a whole
 - Enough rooms so no subject ‘on a cart’
- ### **GRADES 7-8:**
- Retain at least the program for 2011-2012
 - Ensure resources for acceleration for grade 8
 - Middle school teaming model
 - Consumer science
 - Update technology, inservice, support and distance learning
 - Added co-curricular and athletics

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- Start Part 100 requirements like foreign language, home and careers, technology
 - K-12 Enrichment during the year and in the summer
 - K-12 field trips
 - Psychologist
 - Social worker
 - Counseling
 - Project adventure
 - GRADES 9-12:**
 - Retain at least the program for 2011-2012
 - Spanish and French and at least two other foreign languages
 - Vocational counseling
 - Consumer science including culinary arts
 - Business program
 - Psychologist
 - Social worker
 - Project adventure
 - Alternative education program
 - AP/college course offerings
 - International Baccalaureate
 - Driver education
 - Update technology, inservice, support and distance learning
 - Added co-curricular and athletics

Based on all of the student program suggestions and perceptions shared by the Joint Committee members, the Study Team suggests a student program/staffing plan as a *Roadmap* to be considered for a reorganization of Ichabod Crane and Schodack into one district. The final established scope of programming and staffing rests with the newly elected Board and the community if a reorganization is approved by both school district communities.

ELEMENTS OF THE POSSIBLE *ROADMAP* OPTION FOR REORGANIZATION TO CONSIDER

Class sizes

The reorganization ‘What if’ student program picture outlined in the study is based on the current class size goals endorsed and used by both school districts.

Pre-Kindergarten:	18 pupils per class section
Kindergarten and grade 1:	20 pupils per class section
Grades 2 and 3:	22 pupils per class section
Grade 4, 5, and 6:	24 pupils per class section
Grades 7-12 (core subjects):	25 pupils per class section

Pre-Kindergarten Education

Includes 3 full time Pre-K teachers district-wide in the reorganized school district.

In this way, Pre-kindergarten education can serve up to 108 pupils with up to six half-day classes or a combination of half-day or full-day classes.

Special Needs Classes

It is possible that more special needs pupils may be able to be served in the new school district as opposed to having to travel to an out of district site. In 2011-2012 there are 369 special needs pupils of the two school districts served by non-home school providers. ‘Least restrictive environment’ and ‘educationally sound’ criteria must guide the decisions as to which program is best for these unique students. It is

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possible that the resources and collective talent in the new school district may enable the district to deliver more programs for many of these students at the home district.

The ‘What if’ Program Picture that follows is only a roadmap. It suggests the total staff resource to implement a comprehensive Pre-K through grade 12 program if a reorganization is approved. The estimates are based on what it might take to deliver the current program offerings of the two school districts plus other educational opportunities discussed and suggested by the Joint Community Advisory Committee. The specific number of full time equivalent staff and who is assigned to a particular building in a given school year will be judged by the Board of Education as they work with staff given the actual number of pupils enrolled and a profile of their educational needs in that given school year. The Full Time Equivalent Instructional staffing listed should be viewed in light of what type of resource may be provided to the students in a reorganized district. All of the Full Time Equivalents listed in the ‘What if Picture’ do not necessarily exist now on staff. Therefore, the ‘What if’ scenario should be viewed as a plan that may take up to 12 months to implement completely.

K-4 Elementary Program-Classroom Instruction

CURRENTLY IN THE 2011-2012 SCHOOL YEAR*:		REORGANIZATION ROADMAP:	
Castleton Elementary K-4	47 <i>(On average 21.9 pupils per class grades K-5 across the district. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.)</i>	Castleton Elementary K-4 ESTIMATED ENROLLMENT: 320	46 <i>(On average 22 pupils per class grades K-4 across the district. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.)</i>
Ichabod Crane Elementary K-4		Ichabod Crane Elementary K-4 ESTIMATED ENROLLMENT: 692	
JAN. 2012 ENROLLMENT: 350			
JAN, 2012 ENROLLMENT: 679			

**Please note: The current staffing FTE data were itemized by the district office of each district and transmitted to the Study Team. The FTE data reflect staffing as of January 2012 combined in both districts.*

K-4 Instructional Support Services

CURRENTLY IN THE 2011-2012 SCHOOL YEAR*:	REORGANIZATION ROADMAP:	
	FTE	FTE
Pre-K	0	3
Special education specialist (ex. consulting teacher, special education, reading, math, ESL, ELA)	18	18
Vocal Music and Instrumental Music	2.36	3
Art	1.85	2.5
Foreign Language	0	2
Social Worker	1	1
Nurse	2.2	3
Guidance Counselor	1.2	2
Speech	3.7	3.7
Occupational Therapist and Physical Therapist	1.9+ contracted	2
Physical Education	4.5	4.5
Psychologist	2.2	2
Librarian	2.2	2.5
Undefined FTE for unforeseen grade level delivery issues	0	1
<i>Total FTE's Pre-K through Grade 4:</i>	<i>88.11</i>	<i>96.2</i>

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5-6 Upper Elementary Program-Classroom Instruction

CURRENTLY IN THE 2011-2012 SCHOOL YEAR*:		REORGANIZATION ROADMAP:	
Schodack Grades 5-6 enrollment, JAN. 2012: 138	7.3 <i>(On average 18.9 pupils per class grades 5-6 in the district. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.)</i>	Grades 5-6 Upper Elementary School Estimated Enrollment: 434 <i>(Each core team of 4 teachers is responsible for 109 pupils in a day across at least 5 instructional periods; or on average of 21.8 pupils per instructional class period. This includes the assumption that all 5-6 special needs pupils will be fully integrated in all classes. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a subject class)</i>	4 core teams (English, Social Studies, Science, Math); each core team serves the same set of students each day 16
Ichabod Crane Grades 5-6 enrollment, JAN. 2012: 271	12 <i>(On average 22.6 pupils per class grades 5-6 in the district. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.)</i>		

**Please note: The current staffing FTE data were itemized by the district office of each district and transmitted to the Study Team. The FTE data reflect staffing as of January 2012 combined in both districts.*

5-6 Instructional Support Services

CURRENTLY IN THE 2011-2012 SCHOOL YEAR*:		REORGANIZATION ROADMAP:
	FTE	FTE
Special education specialist (ex. consulting teacher, special education, reading, math, ESL, ELA)	4	4
Vocal Music		
Instrumental Music	1.85	2
Art	.73	1
Social Worker	.47	.5
Nurse	.73	1
Guidance Counselor	.73	1
Speech	.97	1
Occupational Therapist		
Physical Therapist	1.10	1
Physical Education/Health	1.62	2
Psychologist	.8	.8
Foreign Language	.5	1
Librarian	1.03	1
Home and Careers (Consumer Science)	0	1
Technology/Engineering	0	1
Undefined FTE for unforeseen grade level delivery issues	0	0
<i>Total FTE's 5 through Grade 6:</i>	33.83	34.3

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7-8 Middle School Program-Classroom Instruction

CURRENTLY IN THE 2011-2012 SCHOOL YEAR*:		REORGANIZATION ROADMAP:	
Schodack Grades 7-8 enrollment, JAN. 2012: 154	5.95 <i>(On average 25.9 pupils per class grades 7-8 in the district. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.)</i>	7-8 Middle School ESTIMATED ENROLLMENT: 425 <i>(Each core team of 4 teachers is responsible for 106 pupils in a day across at least 5 instructional periods; or on average of 21.2 pupils per instructional class period. This includes the assumption that all 7-8 special needs pupils will be fully integrated in all classes. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a subject class)</i>	4 core teams (English, Social Studies, Science, Math); each core team serves the same set of students each day 16 plus 1 math, and 1 science FTE to join the teams to decide how to deliver accelerated math, and science to those grade 8 pupils ready to begin high school courses for graduation credit 2
Ichabod Crane Grades 7-8 enrollment, JANU. 2012: 282	10.5 <i>(On average 26.9 pupils per class grades 7-8 in the district. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.)</i>		

**Please note: The current staffing FTE data were itemized by the district office of each district and transmitted to the Study Team. The FTE data reflect staffing as of January 2012 combined in both districts.*

Grades 7-8 Instructional Support Services

CURRENTLY IN THE 2011-2012 SCHOOL YEAR*:	REORGANIZATION ROADMAP:	
	FTE	FTE
Special education specialist (ex. consulting teacher, special education, reading, math, ESL, ELA)	5	5
Vocal Music Instrumental Music	2.95	3
Art	1.02	1
Social Worker	.93	1
Nurse	1.27	1
Guidance Counselor	1.07	1
Speech	1.13	1
Occupational Therapist Physical Therapist	1.4	1.4
Physical Education/Health	2.49	3
Psychologist	1.2	1
Foreign Language	3.4	4
Technology/Engineering	1.65	2
Home and Careers (Consumer Science)	1.45	1
Librarian	1.47	1
Undefined FTE for unforeseen grade level delivery issues	0	1
<i>Total FTE's 7 through Grade 8:</i>	42.88	45.4

FINDINGS OF THE STUDY

9-12 Secondary School Program-Classroom Instruction

CURRENTLY IN THE 2011-2012 SCHOOL YEAR*:		REORGANIZATION ROADMAP OPTION:
Schodack Grades 9-12 enrollment, JAN. 2012: 365	<i>All pupils take English Language Arts. Therefore, 4 English teachers are responsible for about 91 pupils each in a day across at least 5 instructional periods; or on average of 18.3 pupils per instructional class period. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.</i>	High School ESTIMATED ENROLLMENT: 945 <i>(All pupils take English Language Arts. Therefore, 9 English teachers will likely be responsible for about 105 pupils each in a day across at least 5 instructional periods; or on average of 21 pupils per instructional class period. This includes the assumption that all special needs pupils will attend English classes like all other pupils. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a subject class. There are four full time equivalent teachers in addition for subject area college courses and Advanced Placement Courses. Therefore, it is likely that each English teacher will have a daily instructional 'load' of about 90 pupils.)</i>
Ichabod Crane Grades 9-12 enrollment, JAN. 2012: 654	<i>All pupils take English Language Arts. Therefore, 6 English teachers are responsible for about 109 pupils each in a day across at least 5 instructional periods; or on average of 21.8 pupils per instructional class period. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.</i>	

**Please note: The current staffing FTE data were itemized by the district office of each district and transmitted to the Study Team. The FTE data reflect staffing as of January 2012 combined in both districts.*

CURRENTLY IN THE 2011-2012 SCHOOL YEAR*:	REORGANIZATION ROADMAP:	
	FTE	FTE
Special education specialist (ex. consulting teacher, special education, reading, math, ESL, ELA)	12.4	12.4
English	10	9
Social Studies	10	9
Math	9.6	9
General Science Earth Science Biology (Living Environment) Chemistry Physics	13.5	10
Foreign Language	6.4	7
Additional subject area FTE teachers to provide College courses and Advanced Placement Courses	0	3
Health	1.6	2
Art	4.3	5
General Music Vocal Music Instrumental Music	2.5	3
Technology/Engineering	3	4
Driver Education	0	1
Home and Careers (Consumer Science)	0	.5
Business	.5	1

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Physical Education	4.4	5
Social Worker	1	1
Nurse	2	1
Guidance Counselor	4.8	5
Speech	.5	.5
Psychologist	.6	.6
Librarian	2	1
Resource Officer	0	1
Undefined FTE for unforeseen grade level delivery issues	0	1
<i>Total FTE's 9 through Grade 12:</i>	<i>89.1</i>	<i>92</i>

Teacher Aides and Teacher Assistants District-wide:

The two school districts currently deploy 55 NYS certified Teacher Assistants. There are 4.31 civil service teacher aides currently in the two school districts.

What cannot be defined at this time is how many special needs pupils may require one-to-one assistance as part of their Individual Education Plans as defined by the Committee on Special Education in collaboration with the pupils' parents. It is recommended that the current 59.31 FTE Teacher Assistants and Teacher Aides be planned initially for the reorganized district.

However, as the newly reorganized district undertakes its short range and long range instructional planning, it is suggested that the district re-define and identify settings where instruction needs to be planned for and adjusted by certified teacher assistants within parameters pre-set by a certified teacher; and re-define and identify settings where instructional tasks are delivered and implemented by teacher aides guided exactly by the direction of a certified teacher. Such a study will accurately identify the settings requiring certified Teacher Assistants who help *plan and deliver* instruction; and settings requiring civil service Teacher Aides who help *deliver- with specific instructions- aid and assistance to pupils* and who provide no planning or program development role.

STAFF SEGMENT	THE CURRENT PROGRAM STAFF COLLECTIVELY IN THE TWO DISTRICTS	ESTIMATED <i>WHAT IF</i> SCENARIO WITH A REORGANIZED SINGLE SCHOOL DISTRICT
	Full Time Equivalents	Full Time Equivalents
Teacher Assistants	55	55
Teacher Aides	4.31	4.31

Supervisory/Administrative Resources:

In a move to strengthen teaching and to have a positive impact on student learning, New York State has newly-mandated a comprehensive evaluation system for classroom teachers and building principals. "The 2010 Education Law 3012-c requires each classroom teacher and building principal to receive an Annual Professional Performance Review (APPR) resulting in a single composite effectiveness score and a rating of 'highly effective,' 'effective,' 'developing' or 'ineffective.'"

It requires that all evaluators must be trained and an appeals process must be locally developed between the district and the respective bargaining unit.

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These new Regulations have tight timelines and have placed considerable pressure on school districts to integrate them into their evaluations systems.

This new mandate has an impact on the classroom teachers. It also significantly impacts the building level administrator who would be responsible for the evaluations of his/her staff. It requires the supervisor to observe each teacher two times, use newly-designed teacher practice rubrics, conference with the teacher, monitor the collection of student test data, help teachers develop Student Learning Objectives for courses that do not end with state assessments, write a comprehensive and detailed assessment report on each teacher, develop and create individualized improvement plans for struggling teachers and manage all appeals if they were to occur.

It has been reported after recent training sessions sponsored by the State Education Department, that the number of staff a single supervisor should evaluate in a given year is 12. This study initially targets a 1:25 ratio.

Buildings:	Estimated Enrollment of the Building	Building/Program Supervision	Estimated number of certified classroom teachers in the building	Estimated number of other support teachers in the building	Estimated Direct Report Ratio
Castleton Elementary Pre- K-4	320 K-4 36 half day pre-K	Principal	46	50.6	1 to 33
Primary School K-2	415 K-4 72 half day pre-K	Principal			
Grades 3-4	277	Principal			
Grades 5-6	434	Principal	34	44.3	1 to 39
Grades 7-8	425	Principal	68.5	23.5	1 to 31
Grades 9-12	945	Principal Assistant Principal Instructional Specialist			
School building staff evaluator to work with the principals to accomplish the new law regarding the <i>Annual Professional Performance Review</i> of all State Ed certified school personnel.			(148.5)	(118.4)	APPR evaluation ratio with 9 building level supervisors: 1 to 29
		9			
APPR evaluation ratio with the assistance of the Athletic Director in evaluation of physical education instructors; the Director of Pupil Services in evaluation of special education instructors, counselors, social workers, librarians, OT/PT staff:					1:25

District-wide Supervision/Administrative Resources:

Charted below are the suggested district-wide resources for supervision and administration for the reorganized school district. The profile provides the skill sets to diligently deploy a school district with about 2800 students, over 400 instructional and support staff, and a budget of over \$57,000,000. Other options like a part-time Athletic, Physical Education and Recreation Director who also teaches part of the day are possible.

FINDINGS OF THE STUDY

	Primary Resource Function	Full Time Equivalent
Superintendent	Chief Executive Officer	1
Grant Writer	Seeks out grants for the district and helps to write them	0; purchase the service through the BOCES consortium
Public Information Specialist	Plans, coordinates, and implements an ongoing public information plan to keep the communities well-informed about the school district	0; purchase the service through the BOCES consortium
Assistant Superintendent for Instruction	Plans instruction, implements, and evaluates all pupil support services collaboratively with the building principals. Responsible for developing the instructional technology plan.	1
Director of Pupil Services	Coordinates special needs programming. The role also coordinates, implements, and evaluates all government entitlement grants and other grants that serve instruction. Coordinates the certified staff who implement the integration of support instruction for all pupils; plus the social worker, counseling, nursing, librarian, OT/PT resources of the district.	1
Director of Athletics, Physical Education and Recreation	Plans, coordinates, implements, and evaluates all interscholastic and intramural program elements for Pre-K through 12 and supervises all coaches and physical education instructors.	1
School Business Official	Chief financial officer. Coordinates the delivery and implementation of the budget and support services of the district.	1
Director of Buildings, Grounds and Security	Ensures the maintenance and upkeep of all of the facility resources of the district.	1
Director of Transportation	Organizes and implements all transportation services of the district.	1
Director of Food Services	Organizes and implements all school lunch and breakfast services of the district.	1
Estimated Total	8	

<i>Director for Transition (temporary for at least 1 year)</i>	<i>Develops a transition plan with other district leaders; Coordinates the elements of that plan with the efforts of all staff; troubleshoots unexpected challenges and opportunities as the transition from two districts to one evolves.</i>	<i>1</i>
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District-wide Secretarial Support; Business Office Support; Technology Support; School Lunch, Transportation, Building and Grounds Resources:

Secretarial Support:

The two districts currently employ 25.27 full time equivalent secretarial support positions. It is suggested that the newly organized district will require 25 full time equivalent secretarial support positions. It is suggested that: each school building have at least two secretaries; two FTE secretaries to support the elementary and secondary committees for special education; and that each central office supervisor/administrator be assigned one secretary. The high school includes 4 secretarial FTE's to

FINDINGS OF THE STUDY

support the principals and the guidance counselors. An additional FTE is designated specifically for attendance.

Location	Secretary FTE's Assigned
Castleton Elementary Pre-K-4	2
Primary School K-2	2
Grades 3-4	2
Grades 5-6	2
Grades 7-8	2
Grades 9-12	4
District Office	8
Committee on Special Education	2
Secondary 9-12 Attendance	1
TOTAL:	25; Currently 25.27 on staff

School Business Office Support Staff:

The two school districts currently employ 6.1 full time equivalents in total who support the two separate business office functions. It is suggested that the business office of a newly organized school district will require at least 5 with the following responsibilities:

- ✓ One Treasurer
- ✓ One accounting support person for payroll.
- ✓ One accounting support person for accounts payable.
- ✓ One accounting support person for the accounting of employee benefits like health insurance, assistant treasurer, and internal auditor
- ✓ One support person to perform as a purchasing agent

Instructional Technology Support:

It is suggested that the district employ at least 4 technology personnel. The Assistant Superintendent for Instruction is responsible to facilitate the creation and implementation of the Technology Plan for the district.

Four technology support personnel are based in the school buildings to ensure that software and technology equipment is ready and functioning; and they are in-house resources to mentor all staff with regard to technology use and operation as needed. The two K-4 school settings, the grade 5-6 School, the grade 7-8 school and the 9-12 school share three technology support personnel daily. The fourth technology support person is mainly responsible for mentoring all staff in the use of the hardware and software throughout the district on a daily basis. The reorganized district may wish to explore receiving the building site based service instead as part of a BOCES Aidable service through the Regional Information Center (RIC).

Transportation, food service and buildings operation and maintenance:

TRANSPORTATION: No change. Utilize all current bus driver and mechanic employees. Within the first two years of the new school district it is suggested that the district review, analyze and study the delivery of transportation services to identify ways, if any, that the service can be delivered more efficiently.

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FOOD SERVICE: No change. Within the first two years of the new school district it is suggested that the district review, analyze and study the delivery of school lunch services to identify ways, if any, that the service can be delivered more efficiently.

BUILDING AND GROUNDS: No change. It is suggested that the school buildings and grounds operations and maintenance resources as staffed in each building continue for the newly reorganized school district. Within the first two years of the new school district it is suggested that the district review, analyze and study the delivery of building services to identify ways, if any, that the service can be delivered more efficiently. For example, such an analysis can identify how best the new district can use differentiated staffing to achieve expected standards in cleaning; planned and scheduled maintenance of systems and equipment; availability of on-staff skill sets for electricity, plumbing, painting, refrigeration, and heating, ventilating and air conditioning to efficiently and cost-effectively operate the buildings of the district.

What staff would the reorganized school district probably need?

K. What if Picture of the Staff Necessary to Deliver the Program in a Reorganized District

The ‘What if’ Picture that is summarized below is only a roadmap. It suggests the total staff resource that may be necessary to implement a comprehensive program as a reorganized district, Pre-K through grade 12. The ‘What if’ Picture presented in the study is based on what the Study Team learned from listening to the Joint Community Advisory Committee, the leadership teams and the guest staff from both districts who attended various meetings for the study. The specific number and job title of staff assigned to a particular building in a given school year will be judged by the actual number of pupils enrolled and the profile of their educational needs.

STAFF SEGMENT	FULL TIME EQUIVALENTS IN THE TWO SCHOOL DISTRICTS BENCHMARKED TO JAN. 2011-2012 SCHOOL YEAR	ESTIMATED FULL TIME EQUIVALENTS IN A REORGANIZED DISTRICT REFLECTIVE OF THE ROADMAP PLAN	ESTIMATED NET DIFFERENCE COMPARED TO STAFFING COSTS IN 2011-2012
Pre-K through grade 6 certified teachers (including counselors, social workers, librarians, teacher certified nurses and similar others):	116.01	123.5 including 1 unassigned FTE for unforeseen grade level delivery issues	$+7.49 \times \$79,355 = +\$594,369$
Grade 7-12 certified teachers (including counselors, nurses and similar others):	127.31	133 including 2 unassigned FTE's for unforeseen grade level delivery issues	$+5.69 \times \$83,417 = +\$391,226$
OT/PT (civil service)	4.4	4.4	
Resource Officer	0	1	Est. $+1 \times \$52,000 = +\$52,000$
Nurse (civil service)	6.2	6	$-.2 \times \$49,413 = -\$9,883$
K-12 certified administrators; building and central district services; Directors of school lunch, transportation, facilities	19	17	$- 2 \times \$99,235 = -\$198,466$
Teacher Assistants (certified)	55	55	
Teacher Aides (civil service payroll)	4.31	4.31	
Secretarial	25.27	25	$-.27 \times \$50,122 = -\$13,532$
Business Office Support	6.1	5	$-1.1 \times \$67,985 = -\$74,783$
Technology Support for instruction	3	4	$+1 \times 73,710 = +\$73,710$

FINDINGS OF THE STUDY

Bus drivers	Current delivery plan plus additional transportation services as outlined in the study.
Bus aides	
School lunch workers	Continue current delivery plan.
Operations and Maintenance workers	Continue current delivery plan.
Total estimated net difference compared to 2011-2012:	
+\$814,641	

What would be the plan for bus transportation?

L. Example School Day Time Schedule and Pupil Transportation if the Prime Building Use Option is Implemented to Serve the Pupils in a Reorganized District

Assumptions:

- ✓ All K through grade 4 pupils attend the elementary school within the original school district 'attendance zone'. However, parents who wish to have their elementary children attend an elementary school of the newly reorganized school district that is **closer** to their home may request that attendance at their discretion.
- ✓ The goal is that no child is on a bus longer than 45 minutes.
- ✓ Smaller (less than 66 passenger) buses will probably be used to transport pupils who currently live at the most outer limits of the current school district geographic boundaries.
- ✓ All pupils receive bus transportation in the two districts currently. The assumption is that the same service is provided in a reorganized school district. The current practice of door-to-door and/or centralized pick up points is expected to continue contingent on pupil safety considerations and characteristics at specific locations.
- ✓ It is expected that the reorganized school district continues the current practice of helping families as well as they can with transportation to day care locations depending upon the number of available seats on specific bus routes.
- ✓ It is suggested that existing routes with existing drivers be provided for at least the first year (or longer) of the reorganized district. Starting for year 2, study if there can be some combining of routing where boundaries of the two attendance zones are very close and/or redevelopment of some routes will reduce time for pupils to be on a bus.

Please note that outlined below is one possible comprehensive scenario to provide transportation in a reorganized school district taking into account the assumptions listed above. The scenario is just one concrete example for discussion and adaptation by a reorganized school district. It is conservative in that it uses existing routes in each attendance zone comprised of the boundaries of the two school districts before reorganization.

It is expected that the student day in a reorganized school district may closely follow the times below:

Grades preK-4	Castleton Elementary	8:30 – 3:00	6 hours, 30 minutes
Grades preK-4	Ichabod Crane Elementary K-2 in the current Ichabod primary and 3-4 in the current Ichabod middle school	8:30 – 3:00	6 hours, 30 minutes
Grades 5-6	Upper Elementary (at current Schodack Middle School Building)	8:00 – 2:30	6 hours, 30 minutes
Grades 7-8	Middle School (at current Schodack High School building)	8:00 – 2:30	6 hours, 30 minutes
Grades 9-12	High School at the current Ichabod Campus 9-12 at the current Ichabod High School	8:00 - 2:30	6 hours, 30 minutes

FINDINGS OF THE STUDY

The preliminary transportation framework example for the reorganized school district has the following bus runs:

MORNING BEFORE SCHOOL DAY

	Ichabod Crane Attendance Zone	Est. Number of Routes/buses	Schodack Attendance Zone	Est. Number of Routes/buses
PreK-4	Bus Run; first pick-up 7:45	12 to transport to Ichabod primary and elementary	Bus Run; first pick-up 7:45	10 to transport to Castleton elementary
Grades 5-12	Bus Run; first pick-up 6:45	13 to transport 5-8 to Schodack campus	Bus Run; first pick-up 6:45	6 to transport 5-8 to Schodack Campus
		13 to transport 9-12 to Ichabod campus		6 to transport 9-12 to Ichabod campus

AFTERNOON END OF SCHOOL DAY TO HOME

	Ichabod Crane Attendance Zone	Est. Number of Routes/buses	Schodack Attendance Zone	Est. Number of Routes/buses
PreK-4	Leave Ichabod Campus by 3:10	12	Leave Castleton by 3:10	10
Grades 5-12	5-8 leave Schodack campus by 2:35	13	5-8 leave Schodack campus by 2:35	6
	9-12 leave Ichabod campus by 2:35	13	9-12 leave Ichabod campus by 2:35	6

The current student instructional day and related transportation information is charted below.

	Ichabod Crane	Schodack
Current Elementary Student Day	8:30 – 3:00 (6 hours, 30 minutes)	7:55 – 2:25 (6 hours, 30 minutes)
Current Secondary Student Day Grades 6, 7, 8	7:40 – 2:05 (6 hours, 25 minutes)	7:40 – 2:05 (6 hours, 25 minutes)
Grades 9-12	7:42 – 2:16 (6 hours, 34 minutes)	7:30 – 1:50 (6 hours, 20 minutes)
First student pickup time Grades K-5 Grades 6-12 Combined K-12 routes	7:45 6:45	6:45 6:45 6:45
Total number of bus routes currently:	20 (K-5), 24 (6-12)	6 (K-5), 6 (6-12), 6 (K-12)

The draft transportation plan also includes a Monday through Friday ‘late bus’ to ensure that co-curricular and athletic opportunities are available to all pupils. Currently, late buses are provided two out of five days in Ichabod; five out of five days at Schodack.

Ichabod Crane Attendance Area	10 routes for the Ichabod Crane attendance area
Schodack Attendance Area	7 routes for the Schodack attendance area

Current combined bus fleet for AM and PM before school and after school runs:

	Currently:	
	Buses	Spare buses
Ichabod Crane	24	11
Schodack	12	4

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Estimated Cost to Achieve the Preliminary Transportation Framework Plan for bus transportation to and from school:

The preliminary transportation framework plan was crafted together with the transportation directors and the superintendents of both districts. The draft plan mirrors the current transportation delivery plan. The estimated increase is for the additional ‘late bus’ runs.

Current Number of Bus Routes Collectively by the Two Districts:	Estimated Number of Bus Routes for Initial Planning by a Reorganized School District Given the Program Grade Level Instructional Delivery Configurations and Transportation Assumptions:
62 AM pickup 62 PM take home	60 AM pickup (<i>plus 2 for flexibility for unknown variables</i>) 60 PM take home (<i>plus 2 for flexibility for unknown variables</i>)
Estimated transportation cost basis:	
The following are the total costs per round trip bus route by each of the districts for 2011-2012:	
Ichabod Crane \$39,315	Schodack \$40,556
Average cost for per bus route run round trip plus 10% for inflation and the cost of fuel for budget planning for 2013-2014:	
Ichabod Crane attendance area bus route: \$43,247 Schodack attendance area bus route roundtrip: \$44,612	
Estimated transportation state aid revenue basis:	
Estimated budgeted revenue from state transportation aid which is 90% of all approved expenditures:	
<i>It is suggested that this estimate be conservative. The study estimates transportation aid at 62% for the reorganized district. Each of the school districts received the following state transportation aid percentages for expenditures submitted to the state:</i>	
Ichabod Crane: 60%; Schodack 69.7%	

Estimated Cost to Achieve the Preliminary Transportation Framework Plan for bus transportation to and from school (includes 10% inflation over 2011-2012):

Ichabod Crane, without reorganization:		Schodack, without reorganization:		Est. Annual Cost Both Districts:	Est. Transportation Aid Received in Total Annually:	Est. Net Local Cost in Total Annually:
44 round trips	\$43,247 each	18 round trips	\$44,612 each	\$2,705,884	\$1,701,423	\$1,004,461
10 late Bus routes (2 days a week)	\$10,746 Each (2 days a week)	7 late bus routes (5 days a week)	\$7430 each (5 days a week)	\$159,470	\$100,727	\$58,743
TOTALS FOR 2011-2012:				\$2,865,354	\$1,802,150	\$1,063,204
Estimated in a Reorganized District Made up of Ichabod Crane and Schodack combined:						
				Estimated Total Cost Annually:	Est. Transportation Aid Received Annually:	Est. Net Local Cost Annually:
44 round trips	\$43,247 each	18 round trips	\$44,612 each	\$2,705,884	\$1,701,423	\$1,004,461
17 late bus routes for co-curricular Monday- Friday				\$320,660	\$201,599	\$119,061
ESTIMATED TOTALS:				\$3,026,544	\$1,903,022	\$1,123,522
EST. NET DIFFERENCE; SEPARATE DISTRICTS COMPARED TO REORGANIZED INTO ONE:				+\$161,190	+\$100,872	+\$60,318

FINDINGS OF THE STUDY

What might the financial picture look like for the new school district?

M. *What if Picture of the Estimated Long Term Budget Financials if the Two Districts Reorganize into One District*

The members of the Community Advisory Joint Committee are in concert with the two Boards of Education and superintendents regarding long-term financial viability and sustainability of a reorganized district if approved by the communities. All advise that a reorganized school district must institutionalize a clear planning process to monitor the annual expenditures and revenues to ensure that the reorganization incentive aid is prudently managed over the 14 years.

Therefore, the financial plan framework suggested by the study reflects this explicit guidance by outlining a financial blueprint that ends the budget and property tax reliance on reorganization incentive aid terminating in the same year that the aid stops coming to the newly organized school district.

Challenge: In 2011-2012, there is a wide difference between the current property tax on true in the Schodack District which is higher compared to the Ichabod Crane School District. The difference is 32.78 %, \$4.79 per thousand on each \$1000 property market value. The Schodack tax rate on true value is \$19.40 per thousand; the Ichabod Crane tax rate on true value is \$14.61.

The 'reorganization roadmap' described in the study attempts to balance student program opportunities with the reality of the existing gap in tax on true property tax rates between the two districts. As district board members, school officials, and residents review the information in the study, and specifically the financials reviewed in the next several pages, key questions for public discussion by the districts and their communities are:

*Moving forward, can the districts provide a comprehensive education program with the potential of adding locally judged appropriate opportunities for students, **and** also control costs and property taxes by remaining as separate districts? Or, is the better opportunity--for long term financial stability, and the viability and vitality of the educational program—a new reorganized district?*

The questions can only be answered by the respective communities. It is the intent of the study to provide as much program and resulting financial information as possible to help an informed discussion of the questions by the Ichabod Crane and Schodack School District communities.

ELEMENTS OF A SUGGESTED FINANCIAL BLUEPRINT FOR PLANNING FOR THE REORGANIZED SCHOOL DISTRICT:

- ✓ The elements of financial blueprint for planning are based on the New York State incentive aid provided if the two districts reorganize into one as listed below.

FINDINGS OF THE STUDY

REORGANIZATION INCENTIVE OPERATING AID

Districts: Base Aid as per SED (GEN report line 73):

Ichabod Crane	\$5,748,470
Schodack	\$3,202,319
Total base	\$8,950,789

Anticipated first year of Reorganization: 2013-2014
 Therefore, last of 14 years of incentive aid: 2025-2026

MERGER YEAR	TOTAL BASE AID	INCENTIVE AID %	EST. INCENTIVE	
1	\$8,950,789	40%	\$3,580,316	
2	\$8,950,789	40%	\$3,580,316	
3	\$8,950,789	40%	\$3,580,316	
4	\$8,950,789	40%	\$3,580,316	
5	\$8,950,789	40%	\$3,580,316	
				Total est. first five years:
6	\$8,950,789	36%	\$3,222,284	
7	\$8,950,789	32%	\$2,864,252	
8	\$8,950,789	28%	\$2,506,221	
9	\$8,950,789	24%	\$2,148,189	
10	\$8,950,789	20%	\$1,790,158	
11	\$8,950,789	16%	\$1,432,126	
12	\$8,950,789	12%	\$1,074,095	
13	\$8,950,789	8%	\$716,063	
14	\$8,950,789	4%	\$358,032	
2027-2028		0%	\$0	
				Total est. incentive aid over 14 years:
				\$34,012,998

- ✓ Starting in the first year of the new district, a yearly planned amount of the reorganization incentive aid is placed into approved reserves to protect the district and the communities against unforeseen expenditures and/or unforeseen economy factors over the first 14 years of the new district.

- ✓ Starting in 2014 and annually through 2023, \$400,000 of the reorganization incentive state aid is allocated to pay down the collective debt of the two districts that came to the new district at the time of reorganization. The debt of the new district from the two districts ends more quickly. Also, the state building aid revenue on the debt still comes in to the new district at the yearly schedule matching the original term of the bond. As the state building aid revenue is received through 2024 on the advanced ‘mortgage’ pay-down payments, the revenue can be placed in an approved reserve for future projects or is available as may be necessary to moderate the property tax levy through 2027 and beyond.

- ✓ **The study applies \$2,500,000 or 69.82% of the annual reorganization incentive state aid total to reduce the tax levy** and the property tax for the first year of the reorganized school district. Starting in years 5-14, 49.88% of the incentive aid received is applied to mitigating the property tax.

- ✓ The initial \$2,500,000 is reduced by \$178,571 each year over 14 years in the financial plan suggested by the study. Therefore, the reorganization aid is not relied on for the financial future of the district after it is phased out 15 years after reorganization.

The newly organized school district will need to take action yearly to adjust its revenue/expenditure financial plan annually for the \$178,571. Three possible adjustments are:

1. Regular legislated state aid may increase thus allowing the \$178,571 that is budgeted less in reorganization incentive aid to be ‘made up’ without influencing property taxes.

2. Starting in year two, the newly organized school district will identify annually at least \$178,571 in on-going efficiencies to deliver the program. The \$178,571 represents only about one-third of 1% of the estimated 2013-2014 expenditure budget. Therefore, financial efficiencies identified through on-going due diligence are the prime factors in moderating the reliance on the incentive aid to deliver the program that decreases annually over 14 years.

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3. Annually increase the property tax revenue to take the place of the incentive aid. Based on the true values and equalization rates of 2011-2012, ‘making up’ the \$178,571 that is budgeted less annually in reorganization incentive aid is estimated to equal 9 cents a year per \$1000 of true (market value). For a home with a true value of \$150,000 in 2011-2012, the yearly amount in property tax to take the place of the \$178,571 is an estimated total of \$13.50.
- ✓ It is estimated that the two districts combined will have about \$6,670,000 in cash and approved reserves on June 30, 2013 if a reorganization is approved by the communities. These funds are placed in reserves of the new district in the same pattern as they were in the approved reserves of each of the two school districts before reorganization.
 - ✓ Only in the first year, \$100,872 of the reorganization incentive state aid is used to pay for the pupil transportation plan. In future years, starting with year two, transportation aid received as a revenue from the previous year’s transportation expenditures will not require reorganization incentive aid to be allocated to transportation expenses.
 - ✓ When school districts reorganize, the highest building aid ratio that determines state building aid of the partnering districts is applied to old, existing debt brought to the reorganization. Listed below is the outstanding debt of both districts. Also, listed is the estimated *additional* building aid the new district receives on the combined ‘old’ debt of both districts.

OUTSTANDING DEBT AS RECORDED IN THE EXTERNAL AUDIT REPORTS OF EACH DISTRICT			
Fiscal Year Ending June 30,	Ichabod Crane (aid ratio of 83.5%)	Schodack (aid ratio of 86.6%)	Estimated Annual <u>Additional</u> Building Aid Revenue based on all debt receiving 86.6% state aid times the approved Aidable expenditure amount of the project by SED (i.e. the bond percentage)
2013	\$1,250,065	\$1,894,063	\$34,877
2014	\$1,246,846	\$1,891,488	\$34,787
2015	\$1,242,211	\$1,891,306	\$34,658
Thereafter	\$6,454,087	\$21,521,760	\$180,069

SUGGESTED FINANCIAL PLAN FOR ALLOCATION OF THE REORGANIZATION INCENTIVE STATE AID OVER 15 YEARS:

- ✓ Long term instructional technology acquisition:

An instructional area suggested by the Joint Community Advisory Committee for attention is the goal to implement a sustained, planned approach to ensure that technology tools and resources are available for pupils in the reorganized school district to allow the infusion of technology use in all aspects of the curriculum offerings pre-K through grade 12. Therefore, the forecasted allocation of the reorganization incentive aid over 14 years includes a plan in concert with services available from the regional BOCES Regional Information Center (RIC) to provide technology and software tools.

For example, there is a shared BOCES service called *Common Learning Objectives*. What is shared is the talent of teachers at all grade levels and subject areas of various school districts to identify best practices as to how technology can improve learning and instruction. The heart of the shared service is professional development of teachers from various districts as they work together to explore ways to use technology to increase student learning. One of the by-products of the shared service is that a district may purchase

FINDINGS OF THE STUDY

through the BOCES technology equipment and software for students that will enable their teachers to work together to infuse the tools into the curriculum with best practices. This equipment and resources remain in the district until the district wishes to excess it and replace it.

The service is BOCES aid eligible. It is estimated that the reorganized district will qualify for about 60% in BOCES aid for approved purchases of a BOCES service. The *'What if'* Financial Plan includes an allocation of incentive aid yearly for the reorganized school district to implement a long-range technology plan and to sustain it. Below is the financial model for the technology plan included:

Year of reorganization:	Allocation from reorganization incentive aid:	+ BOCES aid based on the previous year's purchase of <i>Common Learning Objectives</i> shared services:	= Total yearly budget amount for the <i>Common Learning Objectives</i> Shared BOCES service:	Impact on local property tax:
1	\$500,000		\$500,000	\$0
2	\$200,000	\$300,000	\$500,000	\$0
3	\$200,000	\$300,000	\$500,000	\$0
4	\$200,000	\$300,000	\$500,000	\$0
5	\$200,000	\$300,000	\$500,000	\$0
6	\$200,000	\$300,000	\$500,000	\$0
7	\$200,000	\$300,000	\$500,000	\$0
8	\$200,000	\$300,000	\$500,000	\$0
9	\$200,000	\$300,000	\$500,000	\$0
10	\$200,000	\$300,000	\$500,000	\$0
11	\$200,000	\$300,000	\$500,000	\$0
12	\$200,000	\$300,000	\$500,000	\$0
13	\$200,000	\$300,000	\$500,000	\$0
14				
Totals:	\$2,900,000	\$3,600,000	\$6,500,000	\$0

✓ Financial Reserves of the newly organized school district:

Below is the recommendation of Mr. Patrick Powers, CPA of D'Arcangelo & Co. of the list of reserves the newly organized district should achieve at a minimum over the initial years of its existence as a new district.

Reserves:	Suggested Amount:
Encumbrances (Purchase Orders still 'open')	\$200,000
Unemployment Insurance	\$500,000
Worker's Compensation	\$400,00
Liability	\$2,000,000
Employees Retirement Contributions	\$800,000
Tax Certiorari	\$500,000
Employee Benefit accrued Liability Reserve	\$1,000,000
Capital Reserve (Voter approval required to establish and fund.)	\$5,000,000
Repair Reserve (Voter approval required to fund, public hearing to spend.)	\$150,000
Mandatory Reserve Fund	
Insurance	
Property Loss and Liability	\$250,000
Unreserved:	
Unreserved Undesignated Fund balance (subject to 4% of subsequent year's budget.)	\$2,250,000

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✓ **A Suggested Fifteen Year Financial ‘roadmap’:**

Year	Cash from ‘closing the books’ of the two school districts allocated to reserves of the newly organized school district	Total Annual Reorganization Incentive Aid	Incentive Aid Allocated to Reserves Planned by the Board and approved by the voters (example: Capital Reserve Account for long range facility upgrades)	Incentive Aid Allocated to Enable First Year Cost for the Transportation Plan	Incentive Aid Allocated to Fund a Comprehensive Instructional Technology Plan for the New District.	Incentive Aid Allocated to Pay Down the Existing Building Bond Debt of the two districts now the responsibility of the new district (Advanced Payment of Existing Debt)	Incentive Aid Allocated to: Retain and improve student program opportunities; and to, Reduce the tax levy and help stabilize property taxes
2013	\$6,670,000	\$3,580,316	\$419,124	\$161,190	\$500,000		\$2,500,000
2014		\$3,580,316	\$658,887		\$200,000	\$400,000	\$2,321,429
2015		\$3,580,316	\$837,459		\$200,000	\$400,000	\$2,142,857
2016		\$3,580,316	\$1,016,030		\$200,000	\$400,000	\$1,964,286
2017		\$3,580,316	\$1,194,602		\$200,000	\$400,000	\$1,785,714
2018		\$3,222,284	\$1,015,141		\$200,000	\$400,000	\$1,607,143
2019		\$2,864,252	\$835,681		\$200,000	\$400,000	\$1,428,571
2020		\$2,506,221	\$656,221		\$200,000	\$400,000	\$1,250,000
2021		\$2,148,189	\$476,760		\$200,000	\$400,000	\$1,071,429
2022		\$1,790,158	\$297,301		\$200,000	\$400,000	\$892,857
2023		\$1,432,126	\$117,840		\$200,000	\$400,000	\$714,286
2024		\$1,074,095	\$338,381		\$200,000		\$535,714
2025		\$716,063	\$158,920		\$200,000		\$357,143
2026		\$358,032	\$179,461				\$178,571
2027		\$0	\$0				\$0
TOTALS:		\$34,012,998	\$8,201,808	\$161,190	\$2,900,000	\$4,000,000	\$18,750,000

What is expected to happen to property taxes?

N. What if Picture of the Estimated Property Taxes in the First Base Year on a \$150,000 Home in Each of the Towns Served by the Reorganized School District

Below is a chart showing the actual property taxes for 2011-2012 of the two school districts separately.

Ichabod Crane

Chatham	67,601,216	67,601,216	0.7151	94,533,934	20,171,248	6.8457%	1,380,860	20.43
Ghent	64,115,570	64,115,570	1.0740	59,697,924	20,171,248	4.3230%	872,010	13.60
Kinderhook	861,122,845	861,122,845	1.0000	861,122,845	20,171,248	62.3583%	12,578,449	14.61
Nassau	6,893,884	6,893,884	0.6800	10,138,065	20,171,248	0.7341%	148,087	21.48
Schodack	38,488,725	38,488,725	1.0000	38,488,725	20,171,248	2.7872%	562,206	14.61
Stockport	96,870,027	96,870,027	0.8400	115,321,461	20,171,248	8.3510%	1,684,504	17.39
Stuyvesant	201,624,310	201,624,310	1.0000	201,624,310	20,171,248	14.6006%	2,945,133	14.61
Total	1,336,716,577	1,336,716,577		1,380,927,264		100%	20,171,248	

14.61 Tax Rate on \$1000 of Market Value

Schodack

Schodack	587,129,968	587,131,468	1.0000	587,131,468	11,485,159	99.174219%	11,390,317	19.40
Stuyvesant	4,888,792	4,888,792	1.0000	4,888,792	11,485,159	0.825781%	94,842	19.40
Total	592,018,760	592,020,260		592,020,260		100%	11,485,159	

19.40 Tax Rate on \$1000 of Market Value

FINDINGS OF THE STUDY

ESTIMATED EXPENDITURE BUDGET FOR THE FIRST YEAR OF A REORGANIZED SCHOOL DISTRICT:

Total of the 2011-2012 school budgets of the two separate school districts.	\$53,920,541
Estimated inflation for 2012-2013 and 2013-2014 of at least 3.5% for the two years. The first year of a possible reorganization begins fiscal year July 1, 2013	+1,887,219
Estimated Subtotal	\$55,807,760
Estimated difference in the staffing budgets of 2011-2012 of the two school districts separately and with the estimated staffing budget of the reorganized district. The staffing levels are based on the program <i>roadmap</i> described by the study based on insights learned from the Joint Community Advisory Committee and the leadership of both school districts. The total reflects the economy of scale that comes about through reorganization and the replacement of student program elements that have been ‘cut’ in the recent past along with program opportunities reflecting a potential program vision for the future.	+ 814,641
15% increase in the co-curricular, music/drama, and interscholastic resources budgeted separately by the two districts in 2010-2011 which totaled \$753,595.	+ 113,040
Estimated resources to organize and implement the details of the reorganization for one year with the help of a designated <i>Director for Transition</i>	+ 142,528
Estimated added expenditure for transportation based on the grade level configurations of the program and the location of the various school buildings.	+ 161,190
Estimated expenditures to address developing new labor contracts.	+ 400,000
Net estimated <u>expenditure</u> budget for the first year of the newly organized district in *2013-2014:	\$57,439,159

***If a reorganization of the two districts is approved by both communities, the new district will begin for the 2013-2014. Since 2012-2013 revenues are not yet established, known 2011-2012 revenues are used in the calculations.**

ESTIMATED TOTAL REVENUE TO THE NEWLY REORGANIZED DISTRICT IN YEAR ONE:

Total estimate of the 2011-2012 regular state aid revenues. Assumes no increase in regular state aid through 2013-2014.	\$18,137,264*
Estimated federal aid (Ichabod Crane: \$747,047, Schodack: \$325,000) plus other revenue (Schodack \$300,000). <u>Does not</u> include fund balance allocation to reduce the tax levy or transfers from reserves.	+ 1,372,047*
(Estimated new ‘regular’ transportation state aid on additional bus routing. **)	+ 100,872
Estimated annual additional building aid due to a common building aid ratio applied to all existing bond debt of the two individual school districts.	+ 34,877
Cash from the two districts on June 30, 2013	+ 6,670,000
Year 1 of the reorganization incentive aid	+ 3,580,316
Net estimated revenues not including property taxes for the first year of the newly organized district:	\$29,895,376

**Please Note: State aid, federal aid and other revenue totals were identified by the district office of each school district and transmitted to the Study Team in February of 2012.*

***This is an expenditure driven state aid. It is paid by the state in the year following the expenditure and will be paid to the new district in 2014-2015. The reorganization incentive aid in year one only will supply the \$100,872 revenue for the 2013-2014 budget. This is a prime example of how the incentive aid helps to enable the establishment of reorganized school districts.*

FINDINGS OF THE STUDY

POTENTIAL IMPACT ON PROPERTY TAXES:

What if Property Taxes if the Two Communities Choose to Reorganize the Two Districts into One Using the Student Program Roadmap and the Financial Roadmap Suggested by the Study:

Estimated budget for the first year of a reorganized district in 2013-2014:	\$57,439,159
Estimated revenue from state aid, federal aid, other revenue. <u>Does not</u> include a fund balance allocation to reduce the tax levy or transfers from reserves. All available cash on June 30, 2013 from the two districts is recommended to be allocated to appropriate reserves. Allocation of an 'undesignated fund balance' as a revenue to reduce the tax levy in the initial year of a newly reorganized school district is <i>not suggested or a prudent action</i> since such a practice could inhibit the long-term financial stability of the newly organized school district.	- 19,509,311
Estimated reorganization incentive aid applied to first year costs for transportation:	- 161,190
Estimated annual additional building aid due to a common building aid ratio applied to all existing bond debt of the two individual school districts.	- 34,877
Estimated reorganization incentive aid applied to property taxes:	- 2,500,000
Estimated tax levy for the first year of a reorganized district:	\$35,233,781

ESTIMATED TAX RATES FOR THE FIRST YEAR OF REORGANIZATION 2013-2014:

(It is assumed for the illustration that: there are no new assessments, the current assessments remain the same, and the equalization rates remain the same as they were for 2011-2012.)

2013-2014 "WHAT IF" PROPERTY TAXES IF THE TWO COMMUNITIES CHOOSE TO REORGANIZE THE TWO DISTRICTS INTO ONE

Town	Total Accounts	Estimated Assessed Value Tax Levy August-12	Estimated Assessed Value Apportionment August-12	Estimated Equalization Rate	Estimated Full Value	Estimated School Tax Levy	Estimated Percent of Tax Levy	Estimated Tax Levy Dollars	Estimated 2013-2014 Tax Rate
Chatham		67,601,216	67,601,216	0.7151	94,533,934	35,233,781	4.791508%	1,688,229	24.97
Ghent		64,115,570	64,115,570	1.0740	59,697,924	35,233,781	3.025824%	1,066,112	16.63
Kinderhook		861,122,845	861,122,845	1.0000	861,122,845	35,233,781	43.646515%	15,378,318	17.86
Nassau		6,893,884	6,893,884	0.6800	10,138,065	35,233,781	0.513854%	181,050	26.26
Schodack		625,618,693	625,620,193	1.0000	625,620,193	35,233,781	31.709926%	11,172,606	17.86
Stockport		96,870,027	96,870,027	0.8400	115,321,461	35,233,781	5.845136%	2,059,462	21.26
Stuyvesant		206,513,102	206,513,102	1.0000	206,513,102	35,233,781	10.467237%	3,688,003	17.86
		1,928,735,337	1,928,736,837		1,972,947,524		100%	35,233,781	

17.86 Tax Rate on \$1000 of Market Value

Sample property taxes for a home with a \$150,000 market (true value):

Current Tax Year EXAMPLE FOR THE 2011-2012 SCHOOL YEAR					
School District	Town	Example True Value	Corresponding Assessed Value	2011-2012 Tax Rate Per \$1000 Assessed Value	2011-2012 Property Taxes
Ichabod Crane	Chatham	\$150,000	\$107,265	\$20.43	\$2191
	Ghent	\$150,000	\$161,100	\$13.60	\$2191
	Kinderhook	\$150,000	\$150,000	\$14.61	\$2191
	Nassau	\$150,000	\$102,000	\$21.48	\$2191
	Schodack	\$150,000	\$150,000	\$14.61	\$2191
	Stockport	\$150,000	\$126,000	\$17.39	\$2191
	Stuyvesant	\$150,000	\$150,000	\$14.61	\$2191
Schodack	Schodack	\$150,000	\$150,000	\$19.40	\$2910
	Stuyvesant	\$150,000	\$150,000	\$19.40	\$2910

FINDINGS OF THE STUDY

ESTIMATED PROPERTY TAXES FOR 2013-2014:

ESTIMATED FOR THE 2013-2014 SCHOOL YEAR IF THE TWO SCHOOL DISTRICTS REORGANIZED INTO ONE SCHOOL DISTRICT:				
Town	Example True Value of a home	Corresponding Assessed Value	2013-2014 Tax Rate Per \$1000 Assessed Value based on the tax levy reflective of the outlined financial plan for the newly organized school district for 2013-2014	2013-2014 Estimated Property Taxes on a \$150,000 market value ('true value') home
Chatham	\$150,000	\$107,265	\$24.97	\$2679
Ghent	\$150,000	\$161,100	\$16.63	\$2679
Kinderhook	\$150,000	\$150,000	\$17.86	\$2679
Nassau	\$150,000	\$102,000	\$26.26	\$2679
Schodack	\$150,000	\$150,000	\$17.86	\$2679
Stockport	\$150,000	\$126,000	\$21.26	\$2679
Stuyvesant	\$150,000	\$150,000	\$17.86	\$2679

Summary:

- ✓ A property owner with a \$150,000 home in Ichabod Crane can expect a property school tax bill of about \$488 more in 2013-2014 compared to 2011-2012 given the assumptions outlined above.
- ✓ The Schodack owner of a \$150,000 home can expect a property school tax bill of about \$231 less in 2013-2014 compared to 2011-2012 given the assumptions outlined above.
- ✓ The difference in estimated property tax impacts on \$150,000 market value homes is a direct result of the wide difference in property tax rates on true value that *currently exists* in 2011-2012 between the Schodack CSD (currently at \$19.40 per thousand of true value) and Ichabod Crane CSD (currently at \$14.61 per thousand of true value).
- ✓ ***A perspective to help community discussion:*** *If one assumes that a 2% annual increase in the tax rate on true value tax rate is 'reasonable to expect', then the Ichabod Crane tax rate on true (as a stand alone district) estimated for 2013-2014 might be \$15.20 per thousand of market value (true value). In order to mathematically meet a hypothetical \$15.20 tax rate on true value for a reorganized school district combining Ichabod and Schodack, the estimated 'What if' expenditure budget for 2013-2014 presented in the study for the reorganized school district would need to be reduced by about \$5,244,000. If a \$15.20 tax rate on true property value was to be a goal, then it generates a total estimated tax levy of \$29,900,000 for a reorganized school district combining the Ichabod Crane and Schodack Central School Districts. The likelihood that other revenues like an increase in basic state aid to schools could 'make-up' the \$5.25 million is suggested to be slim. Therefore, the 'What if' student program roadmap and the corresponding 'What if' financial picture that results provide a tool to benchmark from where in the student program and services that the \$5.25 million could be 'cut' to achieve a lower tax rate on the true property value for a possible reorganized school district.*

The New York State Property Levy Tax Limit Legislation:

During the 2010-11 session, the New York State Legislature and Governor Cuomo enacted a "Property Tax Cap." This new legislation limits the increases in annual school district property tax levies (not the tax rate).

This "Property Tax Cap" is now called a "tax levy limit." The limit is determined by each school district according to an eight-step complex formula outlined in the law. During the budget preparation process for the 2012-2013 proposed operating budget, each separate district calculated that "limit" and it likely varied

FINDINGS OF THE STUDY

by district. School districts have the option to exceed their 'tax levy limit' with at least 60% voter approval. This new law first affected the 2012-13 tax levies, but would also impact a merged district.

Since school districts are currently operating under this new legislation and no merged district has been affected by it, the full impact of this newly-enacted Tax Levy Limit may not be known. Any long-range financial planning (including expenditures, revenues and fund balance) will be influenced by it.

Below is the language in the Property Tax Law with respect to setting the property tax levy limit for reorganized districts:

REORGANIZED SCHOOL DISTRICTS: WHEN TWO OR MORE SCHOOL DISTRICTS REORGANIZE, THE COMMISSIONER SHALL DETERMINE THE TAX LEVY LIMIT FOR THE REORGANIZED SCHOOL DISTRICT FOR THE FIRST SCHOOL YEAR FOLLOWING THE REORGANIZATION BASED ON THE RESPECTIVE TAX LEVY LIMITS OF THE SCHOOL DISTRICTS THAT FORMED THE REORGANIZED DISTRICT FROM THE LAST SCHOOL YEAR IN WHICH THEY WERE SEPARATE DISTRICTS, PROVIDED THAT IN THE EVENT OF FORMATION OF A NEW CENTRAL HIGH SCHOOL DISTRICT, THE TAX LEVY LIMITS FOR THE NEW CENTRAL HIGH SCHOOL DISTRICT AND ITS COMPONENT SCHOOL DISTRICTS SHALL BE DETERMINED IN ACCORDANCE WITH A METHODOLOGY PRESCRIBED BY THE COMMISSIONER.

If the districts choose to go to statutory referendum regarding reorganization, then specific information should be received from the State Education Department to determine how the above law will pertain to the two districts of this study.

What would the new school district need to do to prepare for the school year in 'September'?

O. Outline of Major Transition Steps to Create One School District if the Communities Approve the Reorganization Referendum

If the two district communities affirm a centralization of the two districts by referendum, the reorganized district faces a series of transition decisions that must be addressed prior to formal establishment of the centralized district on July 1, 2013 and others that need to be addressed by September 2013. In addition there are transition issues that will need decisions in the first one to two years of the new school district.

It is rare that communities have the opportunity to create an entirely new school district, with a new vision for its students, a new educational culture focused on students and teaching and learning; and a chance to increase the opportunities for student growth and development. In order to effectively and efficiently combine the various systems into one coherent, coordinated and seamless school district, a transition plan should be developed if the communities elect to reorganize.

The reorganized school district would be operating concurrently with the two original school districts for a period of time. Each district has its own activities, instructional calendar, assessment program and the like to conduct while the same people will be planning for a new school district to take affect July 1, 2013. Establishing a viable transition team and plan is critical to the smooth and successful implementation of a newly-reorganized district. Implementing a transition plan will require the cooperation and collegiality of all aspects of the school and communities of each district. The major transition decisions (in no priority order) include, but are not limited to:

By July 1, 2013:

- ✓ Select and appoint a superintendent of schools
- ✓ Develop and prepare a 2013-14 school district budget for voter consideration
- ✓ Recognize bargaining units; begin to develop labor contracts with the various bargaining groups

FINDINGS OF THE STUDY

- ✓ Approve a 2013-14 school district calendar
- ✓ Determine formal or 'common name' and file appropriate paperwork with SED
- ✓ Determine the usual school district items like: select auditing firm; school attorney; school physician, etc.

By September 1, 2013:

- ✓ Finalize the plan to house K-12 students and staff within the grade level configurations and the buildings of the reorganized district for educational programming.
- ✓ Select and appoint administrative staff, instructional staff, and support staff
- ✓ Determine, implement and schedule grade 9-12 course offerings
- ✓ Approve a district athletic plan; appoint coaches; identify practice and competition fields
- ✓ Locate the District Office for the reorganized district
- ✓ Establish bus transportation routes and pick up schedules
- ✓ Prepare and approve student handbooks; code of conduct; faculty handbooks; parent handbooks
- ✓ Develop a student orientation plan for each school building especially for the elementary K-5, the middle school 6-8, and the 9-12. The two elementary buildings are in place already in the two districts.
- ✓ Determine school “management” systems and policies such as attendance, use of facilities, and other day-to-day operating guidelines.

Within the first 12 to 24 months:

- ✓ Commence a long-range facilities plan
- ✓ Review and establish Board Policies
- ✓ Study and review the school lunch, operations and maintenance, and transportation programs.

The range of tasks and decisions are broad, but also exciting as a new district becomes set to serve the communities and the students. Establishing a thorough, well-managed, participatory process to guide the new board of education, administration and staff in establishing this new district is recommended.

One approach is for the Board of Education to create a comprehensive Transition Committee to address and advise the Board about the many topics related to combining the systems of a new school district. This Committee should have broad-based composition including, but not limited to, representatives from the instructional staff; support staff; administration; students; parents; and community as well as specialized staff as appropriate.

The *Roadmap* program/staffing plan suggested by this study includes a **Director for Transition** to be in place for at least one year. The study suggests that this resource is key to the success of the new school district. As the transition develops all other staff including teachers, support staff, supervisors, and administrators are accomplishing all of the tasks and responsibilities of delivering the program to students. Transition tasks and decisions are above and beyond the normal operation of a school district and should not be put on the ‘back burner’. The board of education assigns this person to chair the Transition Committee and to oversee all the details of the transition for a period of one to two years.

The Director for Transition: develops a transition plan with other district leaders and staff; coordinates the elements of that plan with the efforts and talents of all staff; troubleshoots unexpected challenges and opportunities as the transition from two districts to one evolves culturally.

Other related topics that the Community Advisory Joint Committee discussed and wish the study to outline are:

FINDINGS OF THE STUDY

- Governance – Board of Education Seats

The number of board of education seats and terms of office are determined, according to NYS Education Law; by the voting public at the time of a 'binding' or 'statutory' referendum vote should the reorganization process reach that point. The voting public will vote to determine if there should be 5, 7 or 9 board members on the new Board of Education along with what the terms of office should be, either 3, 4, or 5 years in length. The board seats are considered 'at large' seats within this new district. It is important to note that “prior agreements” or “gentlemen's agreements” whereby board of education seats of elected school board members are allocated among communities or 'former districts' comprising the new district have been invalidated by the NYS Commissioner of Education.

The matter of governance was discussed by members of the Community Advisory Committee. Although there was no consensus with respect to the number or term of office for the new board, Advisory Committee members expressed the hope that anyone running for a seat would be willing and able to commit the necessary time to the position.

- Name of the New District

Sections 315 and 1801 (2) of Education Law refer to the naming of a newly centralized district. They specify that each school district shall have a legal name consisting of a geographic designation. Boards of education may petition the Commissioner of Education to adopt a simplified name for the newly organized school district.

The Community Advisory Joint Committee members suggest that, if so desired, the Transition committee establish a wide-reaching process that includes students and community to select a ‘common name’ for the new school district. The final ‘name’ must be approved by June 30, 2013.

- School Colors and School Mascot

The two districts all have different school colors, mascots and nicknames. The Community Advisory Committee discussed a process for choosing new ones. They believe strongly that all students currently attending each of the respective schools should be asked to determine these, under the direction of a student organization (i.e. Student Council) that represents all students.

The Board of Education has the final legal authority for approval. However, this real life experience for the new student body to come together to both create and carry out a democratic process to select those aspects of the reorganized district that effect them most, is recommended by the Community Advisory Joint Committee to be a valuable learning opportunity. The recommendation for school colors and mascot would be the initial accomplishment of a new student body which will help in creating a new school culture. The process should be completed before commencement in June of 2013 while all students are still in attendance. Therefore, this issue should be addressed early in the transition process by the students and the Transition committee.

The Joint Committee cautioned against interference or ‘meddling’ from adults in what is recommended to be a student-directed process. Parameters should be identified in advance by the Transition Committee. Such parameters might include such items as: all students in grades K-12 should be permitted to participate; school colors currently used by any of the two districts would not be eligible; school mascots currently used by any of the two districts would not be eligible; and that the students develop a set of criteria to screen ideas consistent with local community tastes.

FINDINGS OF THE STUDY

P. Feasibility Study Question Summary

The two Boards of Education with the NYS Department of State grant commissioned the feasibility study to research data to answer the question:

“Would a reorganization of the Ichabod Crane and Schodack Central School Districts provide enhanced educational opportunities and at the same time increase efficiencies and lower costs for the overall operation by forming one centralized district?”

The study report has been reviewed and approved by the SED for public release. The major question facing the two communities is:

Should the Ichabod Crane and Schodack Central school districts reorganize into one school district?

The definitive opinion about the value of the study question asked in the study rests with the two communities. The Boards encourage public discussion to advise them about reorganization. The ultimate decision to proceed or not to proceed with the implementation of reorganization into one school district rests with the two Boards of Education. The opportunities and challenges documented in the study by the Community Advisory Joint Committee and the SES Study Team can help the public discussion about an important public policy decision.

The findings of the study suggest the following major items along with others for consideration by both communities:

- ◇ Educational program offerings for students and long-term program viability as two separate school districts as compared to the long-term viability of one reorganized school district.
- ◇ The likelihood of smaller total enrollments in both separate school districts over at least the next 5 to 8 school years.
- ◇ Financial stability long-term as two separate school districts with historically lower financial support provided by the state as compared to one reorganized school district.
- ◇ Property tax estimated outlook as two separate school districts long-term as compared to the estimated property tax outlook for one reorganized school district.

SES STUDY TEAM

"Custom tools and research to aid a school district in defining a vision and decision options for serving students in the future."



Dr. Paul M. Seversky



Mr. Doug A. Exley



Mr. Sam A. Shevat

The SES Study Team focuses its work on customized studies that deal with identifying opportunities to provide quality educational programs more effectively and in a cost-effective manner. The major areas of the Team's services are school reorganization through centralization analyses, and the identification and analysis of collaborative functional sharing opportunities between school districts.

The SES Study Team, in an impartial manner, provides research, direction and facilitation through a guided process. The study process emphasizes a data-driven analysis and community involvement to identify possible options to serve pupils in the future.

The common elements followed by the Team to achieve customized studies include:

- A focus on answering a set of questions by school district and community stakeholders;
- Inclusion of, and sensitivity to, all points of view from the communities involved;
- An approach that begins with the collection of data, a review of major findings, sharing of perceptions, recommendations based upon challenges and opportunities, and the modeling of potential options;
- The central role of school district instructional, instructional support, and administrative staff in providing comprehensive data for the study to use to answer the study question(s) posed by the client district(s);
- Public transparency of the work and data developed, compiled, and analyzed by the Study Team;
- The creation of a study report that becomes the prime useable tool by members of the communities as they decide how best to educate their children in the future.

The Study Team brings a combined 105 years of public education experience to working with and helping school districts identify options in serving pupils and their communities. Each team member has served as a teacher, principal and superintendent of a K-12 school district. Doug and Sam each has served as a superintendent of a reorganized district through centralization. Paul has served as a superintendent of a district that explored reorganization and in a regional capacity as a Deputy District Superintendent of a BOCES. Sam has worked for a college to administer programs for public school pupils; Paul has taught graduate level courses in educational administration for 23 years; and Doug serves as a council member at a local university. The Study Team Members have provided consultant services to public school districts since 1998.

Contact the SES Study Team to discuss your school district's specific study project.

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