



**A STUDY ABOUT SHARING
BETWEEN THE JEFFERSON AND
STAMFORD CENTRAL SCHOOL
DISTRICTS**



How might instructional opportunities be enhanced for all students through the reorganization of services between the two school districts?

August, 2011



STUDY SYNOPSIS
**COMMUNITY PRESENTATION
FORUMS**

Jefferson October 17, 2011

Stamford October 19, 2011

Prepared by the
SES Study Team, LLC

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

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

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PROLOGUE

In its introduction to the fiscal problems facing school districts, the *Statewide School Financial Consortium (SSFC)* <http://www.statewideonline.org/> states that,

“If cuts continue and there is no increase in a district's budget and their reserves are stable, it is anticipated that 10% of the districts in NYS will last only a year or less before hitting structural deficit; 34% in 2 years or less and 50% in three years or less ... that's if they still have Federal JOBS money to spend in 2011-12 and can find some aid increase or efficiencies to offset the loss of it in 2012-13 and 2013-14 (the analysis is based on School Report Card Data available on May 4, 2011)

For JEFFERSON:

The Statewide School Finance Consortium projects that with no increase in its expenditure budget for 2011-2012, the Jefferson Central School District will reach structural deficit in 2.1 years given the end of the Federal Education Jobs Fund and a \$373,600 state aid reduction. This assumes that the property tax levy of \$2,418,593 in 2011-2012 does not increase.

For STAMFORD:

The Statewide School Finance Consortium projects that with no increase in its expenditure budget for 2011-2012, the Stamford Central School District will reach structural deficit in 3.5 years given the end of the Federal Education Jobs Fund and a \$557,410 state aid reduction. This assumes that the property tax levy of \$3,289,161 in 2011-2012 does not increase.

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

Jefferson and Stamford have a history of good stewardship of public resources as evidenced by the support of their communities. However, school districts just like individuals and businesses have had to reduce expenditures for staff, student programs, and general operations to deal with the recession of 2008 and its continued fallout for the foreseeable future.

With state aid revenues expected to remain *flat at best*, it is projected that school district expenditure reductions will need to continue in order to offset these declining revenues. It is believed by the Boards of Education of Jefferson and Stamford 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% tax cap law by the governor, schools cannot legislatively go 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 forecast for upstate school districts is not good.

BASELINE ESTIMATE FOR THE NEXT THREE YEARS AS A BASE TOOL FOR FINANCIAL AND PROGRAM PLANNING

The tables below illustrate a baseline financial planning model that assumes that all state/federal aid to the school districts remains stable and that the property tax levy remains stable. A 3% inflation factor is included. The factor may or may not be sufficient since the main ‘commodities’ purchased by school districts are human resources, utilities, and books. Therefore, to deal with the inflation factor, even a 3%

factor, may require reductions in program and operations expenditures and/or an increase in the property tax levy to keep the program offering stable. The model assumes no program enhancement or additions.

JEFFERSON			
2011-2012 Total Budget	2012-2013 Budget Est.	2013-2014 Budget Est.	2014-2015 Budget Est.
\$5,901,198			
Previous Year's Total Budget:	\$5,901,198	\$6,078,234	\$6,260,581
3% inflation estimate Example: for utilities, salaries, health insurance, pension costs, building maintenance; textbooks.	+\$177,036	+\$182,347	+\$187,817
Estimated Total Budget:	\$6,078,234	\$6,260,581	\$6,448,398
State Aid, Federal Aid, other misc. revenue (Same as 2011-2012; flat):	-\$3,482,605	-\$3,482,605	-\$3,482,605
Property Tax Levy (Same as 2011-2012; flat):	-\$2,418,593	-\$2,418,593	-\$2,418,593
Estimated shortfall in revenues:	+\$177,036	+\$359,383	+\$547,200

STAMFORD			
2011-2012 Total Budget	2012-2013 Budget Est.	2013-2014 Budget Est.	2014-2015 Budget Est.
\$8,485,840			
Previous Year's Total Budget:	\$8,485,840	\$8,740,415	\$9,002,627
3% inflation estimate Example: for utilities, salaries, health insurance, pension costs, building maintenance; textbooks.	+\$254,575	+\$262,212	+\$270,008
Estimated Total Budget:	\$8,740,415	\$9,002,627	\$9,272,635
State Aid, Federal Aid, other misc. revenue (Same as 2011-2012; flat):	-\$5,262,679	-\$5,262,679	-\$5,262,679
Property Tax Levy (Same as 2011-2012; flat):	-\$3,223,161	-\$3,223,161	-\$3,223,161
Estimated shortfall in revenues:	+\$254,575	+\$516,787	+\$786,795

THE DILEMMA FACING COMMUNITIES AND THEIR RESPECTIVE BOARDS OF EDUCATION

1. State aid to support local school districts will at best stay flat for the foreseeable future;
And,
2. The capacity for local taxpayers of a school district to shoulder more revenue responsibility 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 as well as have the basic skills to pursue post-high school specialized education opportunities.

EXAMPLE 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;

PLANNING BY THE JEFFERSON AND STAMFORD BOARDS OF EDUCATION AND THIS STUDY

The Jefferson and Stamford Boards of Education collaboratively applied for and were awarded a NYS State Department Grant to identify possible ways the two districts could share efforts and available resources to serve the students of both school district communities at the quality and comprehensive levels reflecting the values of both communities. Both Boards of Education and their superintendents had no pre-conceived notions about how the two districts could work together to deliver the program and deal with the long-term financial reality facing school districts, other municipalities, and local school district residents.

Both Boards did recognize that the financial projections and economy projections underscore that “business as usual” probably will not be a viable option for both school districts and their residents.

The information, options and scenarios offered in this study provide a concrete way for both communities and their Boards of Education to engage public discussion and decision-making to 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 education.

We thank the districts for allowing us to work with you on this study.

The SES Study Team, LLC

Fall, 2011

PURPOSE OF THE STUDY (PAGE 1)

The Jefferson Central School and Stamford Central School Boards of Education and the senior administration are engaged in long range planning for their respective district. As part of their efforts, they have commissioned a study to research data to help the school districts answer the following planning question:

How might instructional opportunities be enhanced for all students through the sharing of programs and the functional reorganization of services between the two school districts?

The goal of the analysis and study report is to provide substantiation for suggestions and insights about the current organization and delivery of the K-12 program. The study report identifies various options for action that the Board of Education, senior administration, and the community may want to give further focus and consideration as they identify efficiencies to ensure the most support of Pre-K through grade 12 pupils in the delivery of the instructional program with the resources available. The study can also serve as a catalyst to engage the communities and school communities to discuss, identify, and analyze other possible sharing opportunities not listed by the study as future influences unfold regarding the two school districts and funding for NYS school districts in general.

METHODOLOGY OF THE STUDY (PAGE 1)

✓ Baseline information.

The school district superintendents collected sets of baseline data including such items as:

- current high school offerings provided by each member district of the study
- current elementary school instructional program elements
- current co-curricular and athletic offerings
- the current practice in serving special needs students
- current instructional support offerings K-12
- financial data about each district

✓ Interviews with groups of staff and other school district stakeholders.

The following stakeholders of both school districts were interviewed by the study team.

- Superintendents
- Business officials
- BOCES District Superintendent and his staff
- Art Teachers
- Elementary faculty of both districts
- Secondary faculty of both districts
- Instructional support staffs
- Instructional and instructional support union executive committees
- Boards of Education
- Clerks of the Board and treasurers
- Heads of Buildings and Grounds
- Technology Coordinators
- Guidance Counselors, nurses
- K-12 principals and Committee on Special Education chairs
- Student Councils
- Food service supervisors
- Transportation supervisors
- Athletic Directors
- Music teachers

✓ Evening Meetings with a Community Focus Group from each School District Community

Appendix A (page 73) lists the community volunteers who were invited to participate in the focus group meeting held in each school district.

✓ Common set of questions asked of school district stakeholders and community focus group participants.

Responses to the following questions were recorded from the stakeholder and community focus group meetings.

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

- What are currently considered to be successful practices in each school district?
- What are areas that have room for improvement in each district?
- What ideas/thoughts are there that could suggest ways the two districts can share and work between themselves to improve and enhance service to students and/or to be more financially efficient?
- What ideas/thoughts are there that suggest ways the two districts can share and work differently with other school districts and BOCES in the region?
- Are there impediments or limitations facing Jefferson and Stamford that could become roadblocks to implement sharing, new ideas and/or programs? If there are, over which ones do you believe the Districts have control? Over which ones do you believe the Districts do not have control?
- What are the skills, attitudes and knowledge that high school graduates will need in the next 5- 10 years?
- Describe a time when you believe things were great within the school ... talk about it ... tell the story ...

SYNOPSIS OF DATA FROM INTERVIEWS WITH THE STUDENTS; THE INSTRUCTIONAL, SUPPORT, AND ADMINISTRATIVE STAFFS; AND BOARDS OF EDUCATION OF THE STAMFORD AND JEFFERSON CENTRAL SCHOOL DISTRICTS (PAGE 3)

#1 What are currently considered to be successful practices in each school district?	
Stamford:	Jefferson:
<ul style="list-style-type: none"> • Shared UPK program • Reading First program in K-4 • High school Academic Intervention Services • Departmentalized 5-6 to help students transition to junior high • Sports programs; no ‘cut’ sports • Involved students in clubs and extracurricular activities • Good coaches • Distance learning availability and opportunities • Good quality of math/science program 7-12 • Students know each other • HS Student helpers in classes like art • Dollars for Scholars • Success in securing grants • One-to-one attention to students • Aware of what kids are doing; academically, socially and emotionally support of students • Special education offering • Adult-student ratio; small class sizes • Staff commitment; willingness to assist w/ clubs, etc • Eligibility program—opportunity to earn privilege to participate in extracurricular • Availability of technology • Bassett School-Based Health Clinic relationship in the School District • “Fireside chats” to help keep community informed • Accountability and evaluation expectations beginning to support consistency and quality • making progress on morale • Good facility • Strong Library program • Good mix of veteran/new faculty • Effective/efficient transportation system • College in HS affiliation • Improved systems • More involvement in budget process 	<ul style="list-style-type: none"> • Shared UPK program • Highly inclusive delivery of special needs programs and services • Technology in the high school • Availability of SUNY college credits • Good leadership; successful student-teacher communication • Well-maintained facility • Open-minded Board of Education • Staff commitment; camaraderie • Students at all levels know each other • 7-12 students helping in K-6 • Community members volunteer and donate • Quality of art and music programs • Drama and sports opportunities • Every pupil gets personal attention • Leadership programs for students • Rolphie Fund to help students in need • Kids are safe • Sense of belonging; kids <u>do</u> fit in • Academic achievement of the students • Graphic design offerings/Yearbook • Open, friendly students; students take ownership of the school • Successful use of grant opportunities • Good communication among staff and administration • Safety record of transportation department • Music/drama productions • Good communication between town highway department and school transportation

Observation: The internal school communities are focused on pupils first.

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

#2 What are areas that have room for improvement?

Stamford:	Jefferson:
<ul style="list-style-type: none"> • Cited for not providing least restrictive environment for special needs pupils; segregated, not inclusive • Role and responsibility of classroom teachers for pupils with special needs • No advanced placement classes • More student course electives • Increase rigorous and challenging courses • Difficult to do fund raising • More opportunities for students with their unique talents to explore with more students that might have similar interests • Improved school lunch menu • Deal with 'senioritis' • Better scheduling to avoid conflicts of when courses/services are available to students • More (technology) & staff training in technology • Board, Administration, staff relations and communication • Improve transportation routing • Upgrade playground and tennis courts • More 'trades' education opportunities • Need to collaborate more about schedules between sports and clubs (extracurricular) • Increase sense of pride • Need for more opportunities in music education and performance • Not enough funding for professional development opportunities for staff • Less staff available for both support and advanced course offerings • Need to increase parent participation in school programs • Lack of internet connectivity for Stamford community • Improve graduation rates • Early intervention • More 'project-based learning' • More curriculum alignment 	<ul style="list-style-type: none"> • Not using interim benchmark assessment data as well as we can to guide instructional practices; training in how to analyze the pupil data available • Do not have a year around staff development plan • Do not have a Reading First model; improve the response to intervention plan • Distance learning capabilities • Clearer communication about when the building is to be used and about any items in need of repair • No advanced placement courses, electives limited • Consistency of insurance plans among the various unions • Ensuring that all staff are utilized 100% of the time; responsibilities of teacher assistants and teacher aides and staff numbers of each • Availability of more lifetime sports • Sizes of some classes; sometimes only 6 students • Nutrition of the school lunch; carbos/fat • Too many students in the upper grades not having full schedules; too many study halls • Buses are too empty on some bus runs • Need for more staff development • District could use more SmartBoard technology for staff

Observation: The internal school communities are straight forward in their perceptions that there are opportunities offered by other public schools that both sets of students do not have available to them now.

#3 What ideas/thoughts are there that could suggest ways the two districts can share and work between themselves to improve and enhance service to students and/or to be more financially efficient?

Stamford:	Jefferson:
<ul style="list-style-type: none"> • Share the woodworking class • Better coordination of cooperative bidding that both districts now participate in • Shared central business office • Share special education services • Share students to provide more courses and opportunities • Share technology • Share a superintendent • Share the bus garage and maintenance 	<ul style="list-style-type: none"> • Different way to deliver business services • Share special education services • Share the bus garage and mechanical services • Share music library • Share community service day program-help both communities • Share field trip experiences like NYC trip, GEAR UP, to fill buses and share costs • Share a superintendent • Share talent of teaching staffs

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

<ul style="list-style-type: none"> • Share special education teachers • Share materials • Share administration • Merge various sports • Offer on-line courses • Offer more distance learning courses • Dovetail bus runs, share transportation • Block scheduling maybe • Share students between both districts; eliminate too many study halls by some students • Share language teachers to increase choices • Coordinate fieldtrips to save on expenses • Share sheet music/music libraries • Share staff development opportunities • Share purchasing between libraries • Work together on grant opportunities • Advanced Placement courses between both districts 	<ul style="list-style-type: none"> • Order more through bulk buying together • Share supervisory personnel like bus transportation, cafeteria management, buildings and maintenance • Pursue shared grants • Chair CSE services • Share course offerings and library media services • Purchase technology together • Purchase fuel, supplies together where possible • Share textbooks • Share staff for unique course offerings
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Observation: The internal school communities are in consensus that there are many opportunities for the school districts to share, and that sharing may bring about more opportunities for both sets of students.

#4 What ideas/thoughts are there that suggest ways the two districts can share and work differently with other school districts and BOCES in the region?	
Stamford:	Jefferson:
<ul style="list-style-type: none"> • Share staff development with a defined common regional initiative that is sustained • Share transportation for special needs pupils • Enlarge distance learning use • Share track with Davenport • Share students among districts; fewer students; districts can't fund classes • Regional HS with 4-5 districts • Purchasing of all commodities • Special ed services • Encourage BOCES to suggest more sharing ideas; more BOCES COSERS • lease/rent Stamford space to BOCES sp ed • BOCES-wide curricular alignment 	<ul style="list-style-type: none"> • Share regional special ed classes among other schools and not just through BOCES • Share special trips like visits to colleges • Share ideas about what works in other districts (best practices) • Use BOCES for grant funding opportunities • Use BOCES for more specialized course offerings; trades and advanced course programs • Do more with school library system

Observation: The internal school communities perceive that the BOCES can be an increased source for sharing and helping to bring about more opportunities for the students of both school districts.

#5 Are there impediments or limitations facing Jefferson and Stamford that could become roadblocks to implement sharing, new ideas and/or programs? If there are, over which ones do you believe the Districts have control? Over which ones do you believe the Districts do not have control?	
Stamford:	Jefferson:
<ul style="list-style-type: none"> • The cost of gas and transportation • Geography of district • Internet availability • The comfort of people with technology • A deep sense of community identity; community pride • Scheduling issues; logistics • Labor contracts • Possibility of a 4th year requirement for math and science • Geography; how long are students on the bus? • Unions are very aware of sharing may cost jobs • Territorial with regard to sports 	<ul style="list-style-type: none"> • Geography • Have deep pride • internal claims auditor • Bargaining groups may resist • Risk for jobs • Teacher cooperation with sharing • Lack of a global perspective • Time schedule • Barriers within community and culture of the two schools • Resources to make it happen

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

<ul style="list-style-type: none"> • Time schedule • Different ways to do things • Lack of staff development to utilize new technologies • Community wants their own school • Lack of support from NYS, ex Regional High Schools • Shared services may lead to 'merger' 	<ul style="list-style-type: none"> • Concern over lack of school/community identity • Small things could work, larger changes could be problematic • 'Everyone's related to everyone'
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Observation: It seems that one of the greatest assets of both school districts—a sense of community-- may be a major hindrance to the sharing that the internal school communities believe can/should happen.

#6 What are the skills, attitudes and knowledge that high school graduates will need in the next 5- 10 years?	
Stamford:	Jefferson:
<ul style="list-style-type: none"> • Willingness for continued learning; especially with technology • Communication skills, written and verbal • Critical thinking • Higher comfort level with being with more people • Computer / technical skills • More experiences, more cultural awareness and cultural experience • A second (or third) language • Social skills • Take initiative • Confidence • Lifetime fitness • Leisure time skills • Flexible in how they learn • Creativity • Life goal planning • Personal finance skills • Less of an 'entitled' attitude • More positive about life; a global perspective; other cultures • Opportunity to learn the basis of a trade • <u>Need</u> to go to college • Common sense • Get used to working with people in another location • Interview skills • Able to see a 'connection between things' • Independent thinker/problem solver • Stronger literacy skills 	<ul style="list-style-type: none"> • Collaborative thinking, problem solvers, work ethic • Confident and independent • Connect more clearly between various skill sets and 'knowledges' • Creative problem solvers, independent thinkers • Increased technology skills <u>and</u> more experience with 'working with your hands' • Basic financial skills of life • Knowledge about economics • Knowing how to find out options • Time management • What you can do to make sure you are marketable • More college classes and experience • How to better survive in college • Digital technology • Understand better the political system • Well-rounded • Reading and speaking skills • Work ethic • Employability skills • Self-advocacy skills • Need to be independent thinker • Ability to use multiple platforms/systems with technology

Observation: Both internal school district communities believe public schools must provide a firm foundation for each graduate to be a successful and functioning, employed citizen.

**SYNOPSIS OF THE PERCEPTIONS, IDEAS, AND SUGGESTIONS
FROM THE JEFFERSON AND STAMFORD
COMMUNITY FOCUS GROUPS (PAGE 8)**

Question 1: What are currently considered to be successful practices in each school district?	
JEFFERSON COMMUNITY FOCUS GROUP	STAMFORD COMMUNITY FOCUS GROUP
<ul style="list-style-type: none"> • Strength/Order of Leadership • Staff cares for students/positive relationships • Opportunity to nurture • Score well on test results/nationally ranked • Student/Teacher communications/positive • Sports program 	<ul style="list-style-type: none"> • Graduation success in college, graduation rate perceived to be good • Scholarships and \$ awards at graduation • Business practices of the school—estimating revenues and looking ahead to the future • The BOCES New Visions Program • Woodshop/Technology shop very strong

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

<ul style="list-style-type: none"> • Small size benefits/allows 1:1 connections • Special Ed department strong • Welcoming to new students • Music/Arts are strong • Children never lost in the crowd • Small class size • Good/new facilities • Student/Community Relationship • People “like family”...often are family • School supported by whole community • Cooperation/collaboration with other parts of the community, ex. Local churches • School helps community/families in times of need • Community events • Administration and staff like a family • Teacher/student ratio • Small town feel • Good music department • Optimistic Vision • Publish own yearbook • Parent/Teacher communications are excellent • Any child can participate in anything they want • Positive peer encouragement • K-12 students are together • Student and staff attitudes are positive and caring • School includes senior citizens in activities/issues • Young people not stereotyped • Community service program • Solid community support for students • Student conduct issues dealt with efficiently; effectively; with good communication with parents • Staff and administration are open/BOE transparency 	<ul style="list-style-type: none"> • Strong staff reputation • Longevity of teachers consistency • Sports program opportunities • School focus of community • Academics first priority-sports are plus/important, but focus is on successful academics • Student involvement at Board meetings • Accessibility of staff to parents • Safe school environment • School is open to outside organizations-use of buildings by the community • Well-rounded students involved in many things and programs • Upkeep of physical plant; physical environment is positive • Grants received for equipment • Supportive parents • After school programs; extended day CROP program • Academic programs and electives • Special education program • Extracurricular opportunities, drama, clubs • Hands on learning with field trips • College in HS program • Staff relations with students—accessibility • Exchange program with NYS students in 4th grade • Term paper in 11th grade English curriculum • School perceived as a family • Speech and debate club program • Small classroom settings • Good quality bus drivers • Service activities in the community • Administration open to community involvement • Honors banquet • Robinson Broadhurst Foundation • Administration and Board willing to make difficult decisions • Supportive Athletic Booster club • Informing the public about what it takes to run a School District • good library program • Bassett School based health clinic • Fire-side chats with the community for communication
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Observation: Both community focus groups expressed support for the active collaboration of the school districts and the communities on behalf of the young people of both communities.

<i>Question 2: What are areas that have room for improvement in each district?</i>	
JEFFERSON COMMUNITY FOCUS GROUP	STAMFORD COMMUNITY FOCUS GROUP
<ul style="list-style-type: none"> • Lack of AP (Advanced Placement) or more/other advanced courses • More opportunities for different sports • Too many study halls for some students • Sportsmanship good in comparison to others, but still room for improvement • Lack of internet access-community wide • More foreign language opportunities • More life skills need to be emphasized and lifetime sports • Grade level class sizes-critical at different levels • Could be more supportive of others-tolerant of others' mistakes-translates into life situations 	<ul style="list-style-type: none"> • Too many students have too many study halls • Outreach by school to parents to get more involved in their child's education • More opportunities for students to volunteer • More faculty participation in commencement • More real world or global perspective • Efficiency with bus routes • Low attendance at Baccalaureate ceremonies • Better cafeteria menu • ‘Them against us’ communications between younger and veteran teachers/staff • Better communication with residents who do not have students in School District

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

<ul style="list-style-type: none"> • Looking at overall Question #1...there's always room for improvement • Attendance at BOE meetings • More advanced economics classes • More distance learning opportunities • CROP Program-after school program opportunities for Gifted/Talented/Enrichment • Class size can be a disadvantage (High/Low) (Large/Small) • Additional foreign languages needed, especially upper level • Driver Education • More 1:1 w/special education students • More programs and broader opportunities for full range of students' abilities • More programs in the trades • Collaboration among grade level teachers is limited (When there's only one section) • More job shadowing needed, ex. Internships • Paper recycling program needed • More resources to help Jr's and Sr's Prepare for future (Culture shock from small school) • School lunches 	<ul style="list-style-type: none"> • Better understanding and compassion by faculty concerning projects • Improve quality of student progress reports • Need mentoring programs among students • Re-implement peer mediation program • More faculty should use e-school to communicate with parents • Reinvigorate a PTA-type organization • Website design class manage and keep up-to-date district website • Offer more than one foreign language • Allow students to have email access • 'Borderline' with special education • Create different ways to communicate about meetings • Combine courses where enrollments are too low • More volunteers needed to help in the school; chaperones, sporting events • Drama productions could be better and of higher quality • Better communication between teachers and parents; especially the secondary staff • Improve a dress code that reflects more pride • Overall school morale could be better—staff/students more involved • Safety on buses; kids having to walk to School District • Competitive aspect of sports program could be better • Counseling support for kids not focused on going to college • More anti-bullying programs • Life skill workshops for kids-real world experiences • Social skills; interpersonal skills of students need to improve • Improved scheduling to allow more options for students
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Observation: Even though the community focus groups clearly express that the communities support the schools, they also with conviction believe that work can be done to increase opportunities for students and that a district can always 'do better'.

<i>Question 3: What ideas/thoughts are there that could suggest ways the two districts can share and work between themselves to improve and enhance service to students and/or to be more financially efficient?</i>	
JEFFERSON COMMUNITY FOCUS GROUP	STAMFORD COMMUNITY FOCUS GROUP
<ul style="list-style-type: none"> • Cafeteria, staffs work together, buying advantages, local foods • Central kitchen concept • Sports; track and tennis add opportunities • Shared community service days • Shared recycling program • Extra-curricular programs like drama production • Costs related to guest speakers; instructional equipment, programs during the day—Arts in Education • Sharing field and academic trips • Share transportation supervisor and the garage • Shared teachers and courses so courses continue and are not eliminated • Sharing volunteers • More student leadership training opportunities • Share costs of AP courses • Share buying power • Share day-care programs • Share staffing through technology • Sharing with a theme of sister schools but still maintain identities 	<ul style="list-style-type: none"> • Sharing classes between 2 schools • Shared field trips • Shared spaces and faculty • Bulk buying at all levels – fuel oil, materials; supplies; equipment • Combine low enrollment classes/courses • Same lunch menus in both schools – combine purchases, etc. • Share guidance counselors • Shared grounds/fields maintenance – with village and town • Use Distance Learning for low enrollment courses • Shared costs for activities by the participants • One Supt of Buildings and Grounds for both schools • Specialized Academic Intervention Services • Share library resources • One tax collector shared between both schools • Bus transportation and garage/trans maintenance – bulk fuel purchase with village; one fueling station; • Possibly contracting out for trans/maintenance • Shared business office • Shared CSE chairperson – special education services

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<ul style="list-style-type: none"> • Shared dental hygienist • Shared administration • Shared garage services 	<ul style="list-style-type: none"> • Combine band/chorus/drama club/jazz band/extra-curricular • Share sports – on a case by case by sport • Share superintendents and administrators • DJ club to provide music at dances • Combine BOCES services between the 2 schools • Share technology and personnel • Share professional development opportunities for both instructional and support staff
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Observation: Both community focus groups are in consensus that there are many opportunities for the school districts to share, and that sharing may bring about more opportunities for both sets of students.

Question 4: What ideas/thoughts are there that suggest ways the two districts can share and work differently with other school districts and BOCES in the region?

JEFFERSON COMMUNITY FOCUS GROUP	STAMFORD COMMUNITY FOCUS GROUP
<ul style="list-style-type: none"> • Buying power on a bigger scale • Sharing materials, books, equipment among schools • Shared transportation; sports and how we structure schedules of our athletics among schools • Vocational programs with others • Professional development; share among several schools • Share buses going to same places • The GEAR-UP program through SUNY Cobleskill • Sharing international travel opportunities • Sharing utilities and power • Share educational programs • More distance learning with a wider region • Schedule courses so they do not conflict with each other • Encourage BOCES to be as cost effective as possible 	<ul style="list-style-type: none"> • Occupational therapy/physical therapy services • Transportation with central garage and central fueling station (i.e. Grand Gorge) • Enlarging 'life skills' opportunities • Greater use of Distance Learning • Optimize the use of BOCES • Limit Distance Learning courses to schools within the sports league

Observation: The community focus groups expressed that there are instructional programs and ‘nuts and bolts’ support services that the two district should probably share.

Question 5: Are there impediments or limitations facing Jefferson and Stamford that could become roadblocks to implement sharing, new ideas and/or programs? If there are, over which ones do you believe the Districts have control? Over which ones do you believe the Districts do not have control?

JEFFERSON COMMUNITY FOCUS GROUP	STAMFORD COMMUNITY FOCUS GROUP
<ul style="list-style-type: none"> • What is the outlook for potential changes? • Geography – some students on outskirts of district may lose • Closeness of small town feel – don't want to lose close knit feeling • Fear of losing staff • Concerns about the nature of the agreements ... fair and equitable – sharing of costs • Possibly different schedules • Fluctuations in enrollments • Changes – cultural – schools – tone of school can be changed • Location changes could be problematic • Financial obligations – who is responsible? Divided properly? - prorate by usage? • How to ensure accountability for protection of investments? • Different benchmarks re: testing • 2 different counties – how do we transfer programs from one county to the other • Town identity and blending of identity • 'Losing' identity of school – could lose school as center of 	<ul style="list-style-type: none"> • Turf Issues/Community to community and staff to staff • NYS issues-regulations/mandates, lack of support • Loss of power comes with collaboration (individual loss) • Current plan not sustainable-getting people to look at the big picture • Need to get people to find common ground • Communication might be tougher-concerns about what we don't know and how that could hurt us • Best people might be let go who are better qualified • Sharing might work long term, but not enough for long term savings...too much to overcome • Continuing loss of enrollment • Potential loss of jobs • Availability of space • Logistics of implementing (i.e. travel) • Loss of identity...not wanting to change and resistance to change • Legal liabilities • Overcome misinformation

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<p>community</p> <ul style="list-style-type: none"> • People's mindset • Sharing ideas that are not clearly communicated • Possibly different expectations and what's acceptable for one group can be different for another - can disturb the “comfort level” of students and adults – fear of unknown – lack of consistency? • May not be able to maintain existing programs by increasing opportunities • Labor contracts language – supervision issues; consistency; lines of authority • Students may not have the opportunity to be well-rounded • Will both communities 'agree' with the shared service? • Will both communities work together? students may lose feeling of stability and what is familiar to them • Could impact jobs – in schools – in community • Lack of common expectations for all staff may disturb or disrupt the connectedness of staff 	<ul style="list-style-type: none"> • Some would rather see things deteriorate rather than share or change • Money needed to institute sharing, such as technology • Need to take each impediment and address one at a time • “Sharing is the first step towards consolidation”
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Observation: It seems that one of the greatest assets of both school districts—a sense of community-- may be a major hindrance to the sharing that the internal school communities believe can/should happen.

<i>Question 6: What are the skills, attitudes and knowledge that high school graduates will need in the next 5- 10 years?</i>	
JEFFERSON COMMUNITY FOCUS GROUP	STAMFORD COMMUNITY FOCUS GROUP
<ul style="list-style-type: none"> • Familiar with job skills – need early • Basic life skills, basic marketable job skills learn how to save money – generational – have gotten away from saving for the future • Collaborate and problem-solve • Greater sense of purpose outside of themselves adaptability – need for secondary job skills – back up plan • Basic computer/tech skills ... advanced tech skills • Positive attitude • Time management • Humility and patience • Independence • Instilling idea of service to others • Know how to locate information • Be well-rounded • Being able to do more with less • Communication skills (4) ... person to person without using technology • Adaptable to different and ever-changing situations • Opportunity to learn trades • Being dedicated to the job ... to the profession ... 'do the best job you can do' • Emphasis on instilling self-worth in individual • Critical thinking • Be passionate • Global and local perspective • Compassion and respect for others – understand 'reality' • Accepting responsibility and consequences for actions 	<ul style="list-style-type: none"> • Work ethic, positive attitude • Understanding international relations • Global view of careers • Math/Science skills • Social Skills • Less of feeling of entitlement • Exposure to other people, places, cultures • Volunteerism • Interpersonal, civility skills, facilitation skills, work with groups • Better understanding of world around them • Overall personal responsibility • Flexibility, multi-tasking • Technology skills • Independence, willingness to do for themselves • Financial management skills, life skills • Languages • Communication • Trades, hands on, vocational training • Citizenship, civility • Self-esteem • Respect for others and property of others • Empathy for elderly • Honor and integrity • Family values and morals

Observation: Both internal school district communities believe public schools must provide a firm foundation for each graduate to be a successful and functioning, employed citizen.

FINDINGS AND OBSERVATIONS OF BASELINE DATA

A. Demographic Data of the Two School Districts (PAGE 14)

CENSUS DEMOGRAPHIC DATA

A valuable tool to use as the Boards and districts make value judgments about future enrollments and the outlook for the Jefferson and Stamford Central School Districts is Federal Census data. 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 Jefferson School District compared to the Stamford School District 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 both school districts. Section A of **Appendix B (PAGE 75)** includes a comprehensive list of demographic characteristics of each school district in four categories: *Demographic and Housing Estimates, Social Characteristics, Economic Characteristics, and Housing Characteristics.*

An example discussion question for Jefferson and Stamford 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 Jefferson and Stamford school districts; separately? In a comprehensively shared fashion?
 - 2.2% of the Jefferson school district population is under five years old; 4.3% for the Stamford school district
 - the median age of the Jefferson school district is 48.8 years and 53.1 years for Stamford; both median ages are considered outside the usual span of ‘child-bearing years’ for the general population
 - 34.6% of the Jefferson school district households include one or more people over 65; 35.9% for Stamford
 - 23.4% of the Jefferson school district households include one or more people under 18; 29.7% for Stamford
 - 92.9% of the population in the Jefferson school district were in the same residence one year ago—6.9% lived in the same county or a different NYS county one year ago; 81.1% of the population in the Stamford school district were in the same residence one year ago—18.9% lived in the same county or a different NYS county one year ago;
 - 86.5% of the Jefferson population has a high school diploma or higher; 83.1% of the Stamford school district population
 - median household income in the Jefferson district is \$42,500 and is \$37,730 in the Stamford district
 - median family household income in the Jefferson district is \$45,489 and is \$50,313 in the Stamford district
 - 8.7% of all the family households in Jefferson are below the poverty level; 12.4% in Stamford
 - 28.1% of all the family households in Jefferson below the poverty level have related children under age 18; 22.1% in Stamford
 - 53.1% of the families in poverty in Jefferson have related children under age 5; 12% in Stamford
 - 12.1% of the total population of Jefferson are below the poverty level; 15.7% in Stamford
 - 33.4% of all people under 18 in Jefferson are below the poverty level; 24.3% in Stamford
 - 2.7% of all people 65 years and older in Jefferson are below the poverty level; 10.7% in Stamford
 - 1.2% of the total housing units in Jefferson have been built since 2005; .7% of housing units in Stamford
 - 89.4% of the housing units in Jefferson are owner-occupied; 68.1% in Stamford

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 characteristics of both school district seem to be in close range to each other. The study team can report that in the interview with young people of both districts, they emphasized how their out-of-school lives and contact with each other were very similar. They explained how the young people of both school districts have grown up playing on the same baseball teams; going to the same places for recreation activities; attending the same places of worship; working jobs together at the same places; and ‘overall hanging out’ together on the weekends, over vacations, and during the summer.

B. Enrollment Projection Data of the Two Districts (PAGE 17)

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.

The baseline cohort enrollment projections described in section C and section D of *Appendix B (page 91)* for both districts examines only the variable of historical birth numbers in each district since 2002 and the number of kindergarteners who enroll five years later from 2007-2010. The baseline enrollment projections for both districts from 2011 through 2015 are charted below:

	JEFFERSON CENTRAL SCHOOL			STAMFORD CENTRAL SCHOOL		
	K-6	7-12	K-12	K-6	7-12	K-12
2010-2011 enrollment	140	147	287	171	183	354
Projected enrollments:						
2011-2012	142	141	283	167	179	346
2012-2013	157	137	294	162	171	333
2013-2014	152	139	292	160	151	311
2014-2015	158	139	297	159	138	297
2015-2016	168	129	297	158	130	288

OBSERVATIONS:

- ✓ The baseline cohort enrollment projection suggests that Jefferson will remain about stable in total K-12 enrollment over the next five years.
- ✓ Jefferson is suggested to gain about 30 in K-6 enrollment and to lose about 20 in 7-12 enrollment over the next five years.
- ✓ The baseline cohort enrollment projection suggests that Stamford will lose about 65 in total K-12 enrollment over the next five years.
- ✓ Stamford is suggested to lose about 15 in K-6 enrollment and to lose about 50 in 7-12 enrollment over the next five years.

FINDING: The 7-12 enrollments in both school districts will likely be smaller over the next five years. Smaller 7-12 enrollments will likely make it more difficult for each separate school district to provide a comprehensive secondary curriculum and program leading to graduation.

C. Pupil Capacities of the Two Districts (Page 18)

Section E and section F of *Appendix B (PAGE 101)* include a comprehensive inventory of the instructional and instructional support space in each school district. Included also is the calculation of the pupil capacities of each district. The pupil capacities are benchmarked to the educational program offered in 2010-2011; to how each principal has assigned the space to deliver the program; to local values about class size maximums; and to the State Education Department protocol for definition and calculations of pupil capacity for a school building.

	Jefferson CS		Stamford CS	
	2010-2011 Enrollment		2010-2011 Enrollment	
	K-6	7-12	K-6	7-12
	140	147	171	183
Pupil Capacity:	184	225	243	346
Use of available pupil capacity in 2010:	76.1%	65.3%	70%	52.9%

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Estimated Pupil Enrollments over the Next Five Years				
2011-2012	142	141	167	179
2012-2013	157	137	162	171
2013-2014	152	139	160	151
2014-2015	158	139	159	138
2015-2016	168	129	158	130
Estimated use of available pupil capacity in 2015:	Jefferson CS		Stamford CS	
	91.3%	57.3%	65%	37.6%
Estimated un-used available pupil capacity in 2015:	8.7%	42.7%	35%	62.4%

OBSERVATIONS:

- ✓ Both schools have significant unused pupil capacity in their buildings due to a lack of enrollment.
- ✓ In five years, it is estimated that the unused grades 7-12 pupil capacity—given the current program offerings at both schools—will increase.
- ✓ The baseline cohort enrollment projects estimate that the only potential growth in enrollment over the next five years may be in grades K-6 at Jefferson. If the projected enrollment comes about, Jefferson has the pupil capacity to serve the potential additional 28 pupils including about 9% unallocated pupil capacity to address the need for flexible use of space to serve the pupils.
- ✓ It is prudent planning to estimate an unallocated pupil capacity of about 10% to ensure flexibility of the delivery of the program. Even with including such a functional flexibility factor, both schools have significant under utilized school building pupil capacities.

	Jefferson CS		Stamford CS	
	K-6	7-12	K-6	7-12
Unused available pupil capacity in 2010:	23.9%	34.7%	30%	47.1%
10% unallocated pupil capacity to ensure flexibility	10%	10%	10%	10%
Functional pupil capacity available for use:	13.9%	24.7%	20%	37.1%

FINDING: Each school district has more than sufficient pupil capacity to support options for the sharing of programs and/or pupils between the two districts.

D. Snapshot of Student Assessment Results of the Two Districts

The 2009-2010 and the 2010-2011 results of the State Assessments for grades 3-6 in English language arts, mathematics and Science along with the results of the State Assessments for grades 7 and 8 and high school math are reported in section G of **Appendix B (PAGE 103)**.

FINDINGS:

- ✓ The small number of per grade level enrollments per grade level can account significantly in performance results expressed in percentages of grade level enrollment.
- ✓ There is no significant range of differences in assessment results of the two schools.

OBSERVATIONS:

- ✓ As grade level enrollments decline in some cases over the next few years, some of the disparities in performance may continue.
- ✓ As financial resources flatten or decline over the next few years, sharing of staff, professional development, and ideas to address student performance shortcomings may become an increasing necessity in order to help all pupils achieve the baseline standards.

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- ✓ The opportunity for collective thinking and synthesis of ideas by joint work of the two elementary faculties and the secondary faculties may result in creating better opportunities to improve the assessments results; i.e. help students achieve at least the next score level up—1 to 2; 2 to 3; or 3 to 4.

The following questions are meant to be a starting point for discussion about addressing student success in achieving the State Assessment Standards:

What instructional programs are in place now that address helping students achieve at least a 3 or 4 on the State Assessments?

What other instructional programs not now in place could help increase the number of students who achieve a least a 3 or 4 on the State Assessments?

What instructional programs are in place now that address helping students achieve a high school diploma?

What other instructional programs not now in place could help increase the number of students who achieve a high school diploma?

What other instructional programs not now in place could help students have the skill sets and goal setting skills to consider a higher education opportunity after high school graduation?

What other instructional programs not now in place could 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?

E. Elementary Program Elements of the Two Districts (page 20)

The program elements chart in section H in **Appendix B (page 104)** lists the elementary program offerings available in both districts for the 2010-2011 school year. The chart is used as a baseline data set for review of the programs and it is understood that some changes may have been undertaken during the 2011-2012 budget review. However, in order to be consistent with other findings of the report, the elementary program chart uses 2010-2011 as the basis for review. When working with community members, the boards, and staffs, focus was placed on the 2010-2011 program offering in both districts since it reflected overall the historical offerings of the districts before major reductions took place for 2011-2012 due to financial constraints.

OBSERVATIONS:

- ✓ Both districts have maintained core offerings for elementary students that meet required mandates and provide for an elementary program as per Part 100 of Commissioner’s Regulations.
- ✓ Both districts utilize in-house and BOCES itinerant staff to provide their programming to elementary students.
- ✓ There are few opportunities for enrichment offerings at either Stamford or Jefferson at the elementary level.
- ✓ Stamford has a school-based health clinic which provides services for the well-being of their elementary students.
- ✓ Psychological, speech, and other related services primarily are used to meet IEP requirements of special education students and are not generally available to the non-IEP elementary student population.
- ✓ Both Jefferson and Stamford have maintained a library media specialist (.50 at Jefferson and 1.0 at Stamford) and counseling services at the K-6 level. In other districts, these services have either been reduced or eliminated due to the present fiscal environment facing all districts in NYS.

FINDINGS:

- ✓ The inclusion of elementary guidance counseling at both districts is substantiation of the value held by both districts regarding the support for children. An elementary guidance counseling program is not a requirement by Commissioner’s Part 100 Regulations.
- ✓ The co-location and sharing by both districts to provide pre-K is a pioneer benchmark that well illustrates how sharing between these two school districts can bring about learning opportunities for students in a quality and cost-effective manner.
- ✓ Support services like speech and psychologist are available only for pupils guided by the Committee on Special Education.
- ✓ Both districts have very similar vocal and instrumental offerings.
- ✓ Both districts take advantage of sharing itinerant BOCES staff services.
- ✓ Both districts value extra-curricular clubs/activities for their elementary students.

An additional finding that deserves attention is the grade level class sections at both school districts in grades K-6. A multi-age approach in delivering grade level instruction at grades K-6 can be a successful method in small schools to provide instructional flexibility and reduce the overall numbers of sections necessary to serve the population of pupils. Instituting such a multi-age approach does not require sharing between the two school districts.

Multi-Age Approach in Delivering Instruction at the Elementary Level: (PAGE 21)

This instructional delivery technique uses a flexible age and curricular approach to instruction. Students within an age range of usually a two year span are grouped together into classroom sections. The focus of curriculum delivery in a multi-age classroom is using varied learning opportunities such as learning centers that emphasize a ‘shared learning’ experience with other students and the teacher. The multi-age delivery method can help students more readily learn at their own pace with recognition of the varied learning styles of individual students.

Stamford: Potential Savings Now without Sharing

There are presently 10 grade level sections of classes at Stamford in grades K-6. They are:

Kindergarten:	2 with 15 pupils each
Grade 1:	1 with 18 pupils
Grade 2:	1 with 24 pupils
Grade 3:	1 with 22 pupils
Grade 4:	1 with 20 pupils
Grade 5:	2 with 14 pupils each
Grade 6:	1 with 17 pupils 1 with 16 pupils

If a multi-age instructional model delivery model is implemented (using class section sizes from 2010-2011 as a baseline), then the class sections would total 8 or 2 less than the delivery method currently used. The implementation of multi-age grade level sections at Stamford would allow 2 full time equivalent instructional positions to be reduced and/or the addition of other instructional services by up to 2 full-time equivalents. **It is estimated that the two fewer FTE’s equate to about \$110,000 including salary and all fringe benefits.** For example, the reduction of the two FTE’s could allow the services of a social worker to be added; or the addition of a full time reading teacher to serve all the children in K-12; or speech services for children who are not special needs pupils identified by the Committee on Special Education; and/ or a reduction of the general fund budget by up to the total expenses for the two positions that are reduced.

Example of a multi-age instructional delivery model using 2010-2011 K-6 enrollments at Stamford:

Kindergarten:	1 with 22 pupils
Kindergarten/Grade 1:	1 with 22 pupils
Grade 1/Grade 2:	1 with 24 pupils
Grade 2/Grade 3:	1 with 24 pupils
Grade 3/Grade 4:	1 with 22 pupils
Grade 5/6:	2 with 20 pupils each 1 with 21 pupils

Jefferson:

There are presently 7 grade level sections of classes at Jefferson in grades K-6. They are:

Kindergarten:	1 with 22 pupils
Grade 1:	1 with 18 pupils
Grade 2:	1 with 17 pupils
Grade 3:	1 with 21 pupils
Grade 4:	1 with 22 pupils
Grade 5:	1 with 15 pupils
Grade 6:	1 with 25 pupils

Since Jefferson has one grade level section at each grade level and most have similar enrollment numbers, it is more difficult to implement a multi-age instructional delivery technique. However, if there are fewer incoming kindergarteners in 2011 compared to the 25 sixth graders moving on to grade 7, it might be possible to implement multi-age instruction at some grade levels.

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If enrollment does increase with incoming kindergarten students at Jefferson, as is projected in 2011-2012 (25 students) and 2012-2013 (28), then a multi-age approach may help the district integrate the enrollments without additional staff. Particularly with a relatively large class (25) exiting sixth grade in 2010-2011, the multi-age configuration provides an advantage for the district starting in 2011-2012. The revised class sections are evidenced below:

Traditional Section Sizes anticipated for 2011-2012 at Jefferson:

Grade Level	Number of Students
Kindergarten	25
1 st Grade	22
2 nd Grade	18
3 rd Grade	17
4 th Grade	21
5 th Grade	22
6 th Grade	15

By applying multi-age delivery model, the class section configuration at Jefferson changes to:

Grade Level	Number of Students
Kindergarten	20
Kindergarten/1 st Grade	22
1 st /2 nd Grade	20
2 nd /3 rd Grade	18
3 rd /4 th Grade	20
4 th /5 th Grade	20
5 th /6 th Grade	20

In both delivery models there are the same number of grade level classroom staff (7 FTE's) and the same number of students (140). Note, however, the more balanced section sizes of the multi-age classrooms versus the traditional setting numbers. One of the key advantages of the multi-age program is its flexibility in the approach to deliver instruction in meeting unique learning development characteristics of pupils and in helping to ensure an equity of class section sizes across the elementary grade levels. Indeed, looking forward to a potential increase in Jefferson kindergarten pupils for the 2012-2013 school year with a projected 28 enrollees, the multi-age delivery option is able to serve all the students with the existing resource of 7 elementary grade level FTE's.

It is important to note that using the multi-age delivery model requires teacher skill sets in differentiated instruction pedagogy. Even with those skills present, it is important to support the teachers who deliver the model with access to outside resources for coaching and/or some set of time (example: 10 hours of paid curriculum development time together before school is in session) to plan strategies and review the curriculum standards for the grade levels involved. The use of the multi-age delivery model is not just about enrollment numbers and cost efficiency. The model can open opportunities for children to excel, re-learn skill sets not totally mastered, and acknowledges that individual child development progress does not necessarily match a specific 'grade level' nomenclature.

It is interesting to note that interviews with staff it was discussed as an asset that both schools already have experienced the successes of older students working with younger students and how both schools value the 'family setting' culture that is created when all students intermingle as may be appropriate.

F. Secondary Program Elements of the Two Districts (PAGE 24)

The program elements chart in section I in **Appendix B (PAGE 106)** lists the secondary program offerings available in both districts for the 2010-2011 school year. Athletic and co-curricular program offerings are also inventoried.

OBSERVATIONS:

- ✓ Both districts have been able to maintain the majority of their core offerings and continue to offer elective options for their students.
- ✓ Music and fine arts programs remain in place in each of the districts, although staffing has been reduced in those areas.
- ✓ Neither district offers Advanced Placement courses, yet is able to offer a limited number of college in the high school courses from local universities.
- ✓ Distance learning is available in Stamford, but receives limited use as a curricular option for students.

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- ✓ For two small school districts, Jefferson and Stamford continue to offer a varied interscholastic and co-curricular program for students. It would appear that there are significant numbers of sharing options that could enhance these options for students of both districts.
- ✓ Due to the districts’ staffing and master schedule options, there are courses at the upper levels that are only available to students on rotating, semester by semester time frames. As a result, top students may not always be able to access upper level courses needed to enter top post-secondary colleges.
These courses include, for example: chemistry, physics, technical science, environmental science, and advanced art.
- ✓ Based upon interviews with secondary students from both districts, 9-12 students in particular seem open to changes regarding combined programs between the two school districts. This includes core, elective, co-curricular and interscholastic athletics; all are seen as viable options for sharing to the students we interviewed.

FINDINGS:

- ✓ Enhanced usage of the distance learning program at Stamford could provide shared benefits to both districts.
- ✓ The fine arts programs of the two districts are similar and could therefore lead to positive sharing options between the two school programs.
- ✓ There are options for sharing both students and staff that could be beneficial to the districts.
- ✓ Both districts strongly value the importance of having co-curricular and interscholastic sports options for their students.
- ✓ Sharing costs and staffing may provide increased elective options for secondary students. In particular, sharing the costs associated with the start-up of Advanced Placement courses could increase students’ abilities to compete with admissions from students in larger schools into upper tier universities.
- ✓ Sharing between the two districts that involves secondary students may be easier to facilitate as it is assumed that parents would be less concerned about transporting older students between the two school buildings.

G. Athletic and Co-curricular Program Elements of the Two Districts (PAGE 25)

Appendix B (PAGE 106) , baseline data letter H, charts the athletic and co-curricular program offerings of both school districts. Both schools offer secondary athletic opportunities in 3 sports seasons. Participation levels in many activities are currently sufficient to maintain the programs at a minimum level by each school district. Both districts value a 'no cut' policy to encourage all young people to participate. Community pride in the programs in each district is high. The following interscholastic sports activities and co-curricular activities had low participation in 2010-2011. *Number in italics suggests a low participation number.*

Activity	Jefferson Participation	Stamford Participation
Boys Modified Soccer	<i>11</i>	25
Girls Modified Soccer	<i>15</i>	25
Boys Varsity Soccer	<i>11</i>	19
Boys Varsity Golf		
Girls Varsity Golf	<i>13</i>	<i>9</i>
Boys Modified Basketball	<i>8</i>	13
Boys JV Basketball	<i>8</i>	<i>10</i>
Girls JV Basketball	<i>12</i>	<i>8</i>
Boys Varsity Basketball	<i>8</i>	12
Boys Girls Varsity Tennis	<i>0</i>	12
Boys Girls Varsity Skiing	<i>0</i>	<i>9</i>
Boys modified Baseball	<i>9</i>	<i>10</i>
Boys Varsity Baseball	<i>9</i>	15
Boys Girls Varsity Track	<i>0</i>	20/30

FINDINGS:

- ✓ The sport activities highlighted in the chart above have low participation numbers benchmarked to the 2010-2011 school year.

OBSERVATIONS:

- ✓ There seems to be an opportunity for both districts to share Boys/Girls Tennis, Boys Girls Track and Skiing in order to provide three new opportunities for Jefferson students and at the same time share the current cost for both sports now expended by Stamford alone.
- ✓ The athletic directors of both schools do collaborate now. For example, when possible transportation is shared.

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- ✓ If athletic team enrollments fall below the number required to field a team, then those immediately lend themselves as opportune for to be shared between both schools. Such numbers, though, usually are not accurately known until just before the athletic season for the sport begins. The districts may want to put in place the protocol for sharing such athletic opportunities as they may surface season-to-season.
- ✓ The districts may also want to analyze the sports programs that typically have little interest or participation. If the decision is made to drop one or more of these, the districts can add new sports (ex., Cross-Country) that may bring in a more diverse student population, is relatively inexpensive to run the sport, usually attracts more diverse students since the skill sets to successfully participate are more broadly attainable, and is in line with a community emphasis on providing sports that can generate a life-long interest among the participants.

H. Financial Health Profiles of the Two Districts (PAGE 26)

Mr. Patrick J. Powers, CPA, PFS senior partner of D’Arcangelo & Co. prepared the financial characteristics charted in section J of **Appendix B (PAGE 109)**. Below is a financial health summary comparison of both districts.

**FINANCIAL HEALTH COMPARISON
AS OF JUNE 30, 2010**

	INDICATORS	SCHOOL DISTRICT		OBSERVATIONS
		Jefferson	Stamford	
1	General Fund Excess Revenues Over Expenditures Last Two Years?	Yes	Yes	Stamford had an excess of revenues of only \$46,000 in 2009.
2	State and Federal Aid / Total Revenue	55.11%	61.38%	Average for the region is 60.5%.
3	K-12 Public School Enrollment including Charter Schools	283	363	646 total enrollment
4	General Fund Expenditures per Pupil	\$18,111	\$22,963	Stamford expenditures per pupil are higher than the State and Regional averages (\$19,082 and \$18,828).
5	Debt Service as a % of Expenditures	3.84%	9.20%	Jefferson's % will increase when serial bond are issued for the renovation project.
6	Percent of Unexpended 2010 Budget	3.2%	5.9%	
7	Percent of Revenue Over Budget	2.2%	2.40%	
8	2010 Excess (Deficit) Revenues and Expenditures to Budget	5.4%	8.3%	Stamford's unexpended budget is slightly higher than my suggested average of 5.0%
9	% of Pupils Eligible for Free/Reduced Price Lunches	49.0%	49.6%	
10	School Lunch Fund Balance at June 30, 2010	\$9,535	\$17,581	Each school had an operating loss prior to subsidies.
11	School Lunch Subsidy from General Fund?	Yes - \$75,008	Yes - \$75,000	Jefferson transfer in 2010 to eliminate amount due from School Lunch fund to General Fund.

FINDINGS:

- ✓ Total budgeted employee benefits at Stamford are \$1,990,177 and are \$969,304 at Jefferson. About \$1,000,000 is due to health benefits at Stamford. The higher employee benefits cost at Stamford reflects significantly in the general fund expenditures per pupil of \$22,963 at Stamford compared to \$18,111 at Jefferson. Stamford’s retiree health insurance is about three times larger than Jefferson’s. Stamford’s total is \$645,672 and Jefferson’s total is \$221,000.
- ✓ Another factor that reflects significantly in the general fund expenditures per pupil of Stamford is special needs expenditure which totals \$893,000 for Stamford and \$538,000 for Jefferson.
- ✓ Both districts transfer tax revenue from the general fund each to sustain the school lunch program. In 2011-2012, Jefferson is transferring \$20,000 and Stamford is transferring \$30,000. The goal for school lunch programs is that they are self-sustaining without a general fund subsidy.
- ✓ State aid revenue is slightly higher at Stamford at 58.49% compared to 51.01% at Jefferson; 44.89% of revenue at Jefferson is from property taxes and 38.72% of revenue at Stamford is from property taxes.
- ✓ The combined wealth ratio, which is a measure of how much income and property wealth supports each pupil in a district compared to the state average, is .636 for Jefferson and .633 for Stamford. A lower CWR (combined wealth ratio) signifies a poorer district than one with a higher CWR.
- ✓ Stamford has \$741,645 in appropriately authorized reserves; Jefferson similarly has \$636,708 in appropriately authorized reserves. Stamford also has a significant capital reserve of \$700,000 that only can be used with voter approval.

OBSERVATIONS:

- ✓ As per filed budget reporting documents to the state, Jefferson appropriated \$75,000 in 2010-2011 from the fund balance of 2009-2010 to reduce the tax levy. Stamford appropriated \$249,000. The fund balances appropriated from a previous year to the next fiscal year to reduce taxes is the amount that needs to be appropriated year-to-year to “stay even” *unless* expenditures are significantly reduced thus reducing the tax levy requested. For the 2011-2012 budget year, Jefferson appropriated \$ 75,000 from the 2010-2011 fund balance to reduce the tax levy; Stamford appropriated \$251,000 in fund balance from 2010-2011 to reduce the tax levy for 2011-2012.

I. The Role of BOCES in Sharing Opportunities (Page 27):

The sharing opportunities identified by the study can all be implemented by Jefferson and Stamford as two partnering districts. In New York State, school districts can receive help in implementing sharing through the Board of Cooperation Education Services. The State of New York provides a financial incentive for sharing among school districts who share through BOCES through an expense driven aid called BOCES aid.

It is recommended that if the districts decide to pursue one or more of the sharing options listed in this study, then as a step toward implementation the districts request the BOCES District Superintendent to: one, let the districts know if the shared service is allowed through the BOCES model; and, two what might be the gross and net cost to the districts if the sharing was through the BOCES model. In this way, the districts will have accurate up-to-date data as to which sharing model---sharing just as two partner school districts, or sharing through the BOCES---is most advantageous financially.

SUGGESTIONS: OPTIONS THAT ARE LIKELY TO ACHIEVE POTENTIAL EDUCATIONAL BENEFITS FOR ALL PUPILS, FINANCIAL SAVINGS, MANAGEMENT IMPROVEMENTS, AND BENEFITS TO THE COMMUNITY THROUGH FUNCTIONAL CONSOLIDATION, SHARED SERVICES, AND/OR REGIONALIZATION OF THE TWO SCHOOL DISTRICTS (PAGE 32)

The baseline data; the ideas/perceptions of the staff and stakeholders of both school districts expressed at the interviews; and the ideas/perceptions of the community members from each school district expressed at the evening focus group meetings were studied and analyzed by the study team.

What follows are possible sharing options the school districts and their communities may want to consider. They are possible opportunities to bring about enhanced student learning and they are options that might bring about financial savings through comprehensive sharing. Some of the options may not bring about dollar savings, but they may bring about ‘savings’ in that they allow the districts and communities to do *more* for their students using the current dollar resources that are now allocated by both communities.

All of the sharing options listed in the study increase opportunities for pupils either directly or by using available funds now spent for instructional support activities differently. Many of the options result in staffing changes which include the reduction of the current number of full time equivalent staff and/or changes how staff serve their school districts and pupils now. In addition to being the policy making legislative body and ‘caretaker’ of public education for the community, a board of education is also an employer and usually the school district is a major employer in the community. Most boards of education enact employee staff reductions or job changes carefully, legally, and with dignity for the employees affected. As challenging that employee changes can be, most boards of education make them when more opportunities for pupils are a result and when such changes enable better stewardship of the finite community financial resources provided to the school district by the members of the community.

Recommendation: It is strongly recommended that the first item to conclude before any sharing opportunity is pursued is the daily time and weekly schedule. It is suggested that both school districts institute either a four day nomenclature schedule (day A, B, C, D) or a 6 day nomenclature schedule instead of using a Monday-Friday weekly 5-day schedule. In this way, both sets of pupils of both districts receive equitable service from each sharing opportunity regardless of vacation days, or weather-related school cancellation days. When such vacations or school closings due to weather occur, the day cycle begins where it left off before the vacation or emergency closing. An asset also, is a joint decision to have the same or very similar starts and ends to the student instructional day.

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The following charts of sharing scenarios reflect those options that seem to be the most educationally sound and cost-effective avenues to pursue given the data and inferences gained throughout the study. **They are not hypothetical.** The SES-Study Team recommends that each sharing option is ‘doable’ and appropriate for implementation. The action options focus on: providing more opportunities for all pupils; reducing current costs; and reducing current costs to allow the limited resources available to be used differently in order to provide more services and programs for pupils with the same dollars already given by the communities. The scenarios are not listed in any priority order or advocacy order. The options reflect the criteria of common sense and due diligence in the actions they suggest that should be considered. The charts are provided in a format such that this document can be used as a tool to analyze and add to each possible sharing scenario as the school community ponders what actions should be taken, if any, to deliver the entire school district program as academically and financially efficient as possible at the quality levels expected by the two districts and the communities. Local school district community discussion and analysis of the perceived instructional and financial impacts of each sharing option will in all likelihood identify additional ‘Opportunities and Challenges’ not listed in the charts.

Many of the options could be implemented this school year or in 2012-2013. It is unlikely that all the options would be implemented at once. Also, there are some larger scope options that if implemented would make moot some more focused sharing options outlined by the study. Therefore, the financial cost-out rubrics allow the study to be an on-going working tool for planning and decision-making as each district separately and together chart and plan their futures in serving their respective pupils and communities. Potential savings and costs of the options benchmarked to what the districts are now expending in 2011-2012 are listed on page 52 of this synopsis.

The current economic condition of the state and the economy may require some immediate action to begin in the 2011-2012 and certainly by the 2012-2013 school year. Beginning the discussion now about various sharing options helps the development of a set of values by which the districts and community stakeholders will be able to ultimately identify those sharing actions that best serve the pupils and the community within the next three years or sooner. It is recommended that the sample questions listed below may be a good tool to begin to identify values that will help the school boards and the communities judge which shared instructional delivery options and shared instructional support options might be best to implement for the children of Jefferson and Stamford as well as for the taxpayers of both districts.

- ❖ Are there current K-12 programs or offerings that should change?
- ❖ Are there K-12 programs that should be added to the offerings?
- ❖ What is the community’s and Board’s vision about pre-kindergarten education availability for the future?
- ❖ What is the belief about Jefferson’s role and Stamford’s in collaborating with BOCES for shared instructional programming and shared instructional support services?
- ❖ What are the class sizes at the grade levels K-12 at which the Boards in their policy role and the senior administration in its curriculum/program leadership role feel ‘uncomfortable’? How many is too big? How many is too small? Should the existing class size goals be changed?
- ❖ What are the communities’ and boards’ perceptions and collective wisdom about the transportation of students in pressing economic times? In helping to achieve more learning opportunities in a more programmatically and cost effective manner?
- ❖ How comfortable are the Boards with the possibility of unused classroom spaces due to estimated future enrollments?
- ❖ How comfortable are the communities and the Boards with the potential of renting unused space or partnering with community agencies to provide services in the schools?
- ❖ Are there community agencies or not-for-profits that could be even more of a community asset if they were housed in one or more of the elementary schools? In the high schools?
- ❖ What is the outlook of the Communities and the Boards about the future in light of Jefferson’s and Stamford’s geographic location and the potential for economic growth?
- ❖ What are the program practices and operational practices the districts have *already* put into place at one or more of the school buildings that makes them program and operationally effective?

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- ❖ Do the Communities or Boards perceive that there are ineffective program practices at one or more of the schools? If so, what are they?
- ❖ Do the Communities or Boards perceive that there are practices that are not cost-effective at one or more of the schools?
- ❖ What are the criteria to judge ‘cost-effective’ initiatives in keeping with the values and visions of the districts and the communities in serving students?
- ❖ What may happen economically and programmatically to both school districts and communities if nothing is done differently by the two districts either collaboratively or separately within the next 12 to 36 months?
- ❖ What might be the perceptions of the labor contract units in what might be the outcomes if the districts do nothing and the economic variables continue, and in what might be the outcomes if the districts pursue collaborative sharing in serving the students of both school districts?
- ❖ Both Boards take seriously their role as an employer. Are the Boards and Communities prepared to implement sharing opportunities that are diligent, common sense ways to enhance student programming and lower instructional support costs-- and that also may negatively affect one or more current employees?
- ❖ Both school communities support their schools and care about the young people resident in both school districts. At what point does the mere cost to provide the services separately and not in a shared manner, unfortunately, over-ride the care and ‘love’ the communities have for their respective school districts?

ELEMENTARY AND SECONDARY PROGRAM SHARING OPTIONS (page 35)

SHARING OPPORTUNITY:	Library Media Specialist (Elementary and Secondary)
CATEGORY	Elementary Program Elements
CURRENT METHOD OF DELIVERY:	Jefferson has a .50 library media specialist and Stamford has a 1.0 library media specialist
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	<p>SCENARIO 1: Share the 1.0 FTE from Stamford between the districts. Each district provides an aide for each library. The shared library media specialist is responsible for updating the collections, budgeting, and supervising the elementary library programs. Maintain the part time .50 FTE of Jefferson. Assign this individual to develop enrichment curriculum/activities for both districts.</p> <p>SCENARIO 2: Share a 1.0 library media specialist between both districts. The person is responsible for the oversight of both programs. Each district provides an aide in each library to assist in the normal routines associated with each library program. The library is primarily another teaching center that classroom teachers use with their students.</p>
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	<p>FOR JEFFERSON and FOR STAMFORD:</p> <p>SCENARIO 1: Maintains professional oversight of the library program and provides for a dedicated person to provide new enrichment opportunities for K-6 students.</p> <p>SCENARIO 2: Maintains professional oversight of the library program.</p>
MAJOR CHALLENGES OF SHARING:	<p>FOR JEFFERSON and FOR STAMFORD:</p> <p>Scheduling of the shared full time library media specialist and/or .50 FTE assigned to provide enrichment opportunities with classroom teachers. Options include daily share which requires daily travel time or an alternating day schedule which requires no travel during the work day. If the library is considered a ‘special’ (that is, pupils go to the library for a ‘library lesson’ to allow the classroom teacher to have preparation time), such a practice should be reviewed. If the practice continues, then a teacher assistant should be provided instead of a library aide.</p>

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

STEPS NECESSARY BEFORE IMPLEMENTATION:	FOR JEFFERSON:	FOR STAMFORD:
	Choose Scenario 1 or 2 or similar. Instructional review of library programs and how they can best be coordinated between the two districts. If Scenario 1 is implemented, plan the enrichment program outcomes and delivery curriculum. If Scenario 2 is chosen, reduction of .50 FTE media library specialist by the Board. The redeployment of an existing aide or teacher assistant for the library.	Choose Scenario 1 or 2 or similar. Instructional review of library programs and how they can best be coordinated between the two districts. If Scenario 1 is implemented, plan the enrichment program outcomes and delivery curriculum. The redeployment of an existing aide or teacher assistant for the library.
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	.50 FTE Salary	1.0 FTE Salary
	FICA (.0765)	FICA (.0765)
	Retirement (.115)	Retirement (.115)
	Health Insurance	Health Insurance
	Total Current Cost: \$	Total Current Cost: \$
ESTIMATED SHARED FINANCIALS/COST:	JEFFERSON and STAMFORD	
	SCENARIO 1: .50 library media specialist salary: FICA (.0765): Retirement (.115): Health insurance: 1.0 library media specialist salary: FICA (.0765): Retirement (.115): Health insurance: TOTAL: \$ Share for each equals 50% of the total = \$	
	JEFFERSON and STAMFORD	
	SCENARIO 2: 1.0 library media specialist salary: FICA (.0765): Retirement (.115): Health insurance: TOTAL: \$ Share for each equals 50% of the total = \$	
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	SCENARIO 1: There are savings for Stamford. Through sharing the combined 1.50 library media specialists, program opportunities are expanded in that there is now the resource to develop an enrichment curriculum for K-6 in collaboration with the class room teachers for grades K-6 of both school districts. For an additional expenditure, Jefferson can add a resource to implement more attention to elementary enrichment opportunities.	
	SCENARIO 2:	
	JEFFERSON	STAMFORD
	Total Current Cost:	Total Current Cost:
Minus Total Estimated Cost to Implement:	Minus Total Estimated Cost to Implement:	
Estimated Net Cost (+ or -): \$	Estimated Net Cost (+ or -): \$	

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS
SECONDARY PROGRAM SHARING OPTIONS (PAGE 37)

SHARING OPPORTUNITY:	Interscholastic athletic offerings of teams with low participation numbers and/or that one district offers and the other does not.	
CATEGORY:	Secondary Program Elements	
CURRENT METHOD OF DELIVERY:	Both school districts offer a menu of interscholastic athletic teams in 3 sports seasons.	
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	The school that offers an interscholastic team that the other district does not hosts participants from the sister school. Or, the districts combine low participant teams in a given year to field one team. The decision as to which district takes prime delivery of the shared sports team is on a case-by-case basis.	
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	<p>FOR JEFFERSON and FOR STAMFORD:</p> <ul style="list-style-type: none"> • More opportunities and choices for students. The district without a sports team choice can now offer the sport at a lower cost than as a single district. • Low participant (in a given year) sports can ‘survive’ as a choice and opportunity for all students; and the collaboration of the two districts in providing the sports team is at a shared cost. • Athletes who might not see playing time in one sport may participate more in a different sport. • Competition for 'playing time' could increase skill levels. • Travel schedules for existing sports teams should be shared between schools to determine opportunities to minimize travel costs. • Low participant teams like baseball with sometimes only 9 participants would not have to forfeit if a player is ill or does not attend the contest. 	
MAJOR CHALLENGES OF SHARING:	<p>FOR JEFFERSON and FOR STAMFORD:</p> <p>Sharing (or merging) of low participant sports teams could reduce the playing time of athletes on the existing individual teams; but the athletic team opportunity can still be offered. Transportation costs could increase; the guest district transports players to the host district as its sole expense and not as an expense of the share. Travel patterns might change for spectators.</p>	
STEPS NECESSARY BEFORE IMPLEMENTATION:	<p>FOR JEFFERSON and FOR STAMFORD:</p> <p>Identify the shared team options. Decide which school hosts the shared team(s). Ensure there is consistency in the policies and regulations required by both districts for participants in athletics. Each district is also responsible for its own student athletic accident insurance offerings.</p>	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	current coach(es) stipend: FICA (.0765): Retirement (.163): Transportation to games/meets: Equipment: Supplies: Cost for officials:	current coach(es) stipend: FICA (.0765): Retirement (.163): Transportation to games/meets: Equipment: Supplies: Cost for officials:
	Total current cost: \$	Total current cost: \$

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

ESTIMATED SHARED FINANCIALS/COST:	<p align="center">FOR JEFFERSON and FOR STAMFORD:</p> <p>The total cost for the host district to provide the shared team includes the cost criteria listed above. At the end of the season the total number of team participants from both districts who finish the season is divided into the total cost to provide the team sport. The cost per participant is multiplied by the number of students who finish the season from each school district. The guest district remits that total share to the host district that sponsored the sport for both school districts. Cost savings will vary based on the number of participants. If each district now provides the sport, it is estimated that the savings will average at least 40-50% of current cost for a district to offer a low participant alone. If a district partners with the sister district with a team it does not offer now, there is an added cost to the district without the sport team currently. However, the cost to participate will be at least 40 to 50% less than if it offered it on its own. The host district with the unique sports team will experience a range of savings based on the number of participants from the guest school that participate.</p>	
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Total Current Cost:	Total Current Cost:
	Minus Total Estimated Cost to Implement:	Minus Total Estimated Cost to Implement:
	Estimated Net Cost (+ or -): \$	Estimated Net Cost (+ or -): \$

SHARING OPPORTUNITY:	Sharing of Distance Learning Equipment and Room at Stamford	
CATEGORY:	Secondary Program Elements	
CURRENT METHOD OF DELIVERY:	Stamford offers distance learning through the BOCES consortium. Jefferson does not.	
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	Jefferson students would travel to Stamford to take part in scheduled distance learning opportunities scheduled throughout the region and the state.	
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	FOR JEFFERSON: STAMFORD:	FOR STAMFORD:
	Jefferson students 9-12 can increase their opportunities by participating through distance learning at the Stamford school site.	Stamford can recoup some expense for the distance learning equipment, service and classroom it has located at its school.
MAJOR CHALLENGES OF SHARING:	FOR JEFFERSON: STAMFORD:	FOR STAMFORD:
	Transportation of students to Stamford.	Hosting various students from Jefferson throughout the day.
STEPS NECESSARY BEFORE IMPLEMENTATION:	<p align="center">FOR JEFFERSON and FOR STAMFORD:</p> <p>Identify courses that are available through the distance learning system. Jefferson's planning for transportation of pupils to Stamford and scheduling of its pupils to take into account travel time are challenging tasks. Coordinate student week and student day schedules between both school districts.</p>	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	Does not offer.	Total cost for the distance learning service through the BOCES.
	Total current cost: \$ 0	Total current cost: \$

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

ESTIMATED SHARED FINANCIALS/COST:	JEFFERSON	STAMFORD
	The optimum method is for Jefferson to assume a percentage of the cost of the distance learning tool at Stamford based on the number of pupils from Jefferson who participate. Then, the BOCES decrease Stamford's service contract by that amount and charge Jefferson that same amount on its BOCES contract. In this way, Jefferson can qualify for BOCES aid on a shared service.	
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Total Current Cost: 0	Total Current Cost:
	Estimated share of distance leaning tool: %	Minus Total Estimated Cost that Jefferson will use:
	Estimated Net Cost % times the Stamford distance leaning contract with the BOCES: \$	Estimated Net Cost: \$

SHARING OPPORTUNITY:	Science Teacher as a Direct Share or as a Share with BOCES	
CATEGORY:	Secondary Program Elements	
CURRENT METHOD OF DELIVERY:	Jefferson serves grades 7-12 science with 1.60 teachers plus .2 of a math teacher who teaches science for a total of 1.80 FTE science teachers. Stamford serves grades 7-12 science with 2 teachers plus .35 teacher purchased directly with Roxbury CS for a total of 2.35 FTE science teachers.	
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	<p>Option 1: Jefferson and Stamford work with ONC BOCES to have the present .60 teacher becomes a BOCES itinerant science teacher for higher level science courses with 62.5% purchased by Jefferson and 37.5% purchased by Stamford. (Normally, 60% is the maximum FTE that can be purchased through a BOCES service—however, SED approval for a percentage above 60% is sometimes approved depending upon unique circumstances.) The two districts closely coordinate the time necessary for the shared teacher to deliver the science instruction necessary. This arrangement also allows BOCES aid back to the districts the following year</p> <p>Option 2: If using the BOCES vehicle is not possible, the .6 position at Jefferson becomes full time to serve 62.5% at Jefferson and 37.5% is purchased by Stamford. The Stamford-Roxbury arrangement ends. The two districts then examine the “pooled” staff to determine the optimal use, particularly as it relates to higher level courses, i.e. Chemistry and Physics. Depending on enrollment numbers and scheduling of the faculty, the districts can examine either faculty moving between the two districts (ideally at the beginning or end of the day) or students traveling between the two. If this option creates more flexibility within the instructors’ schedules, there may be the possibility of moving towards development of an advance placement course, such as AP Biology.</p>	
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	FOR JEFFERSON: If more flexibility is generated in the two districts’ science schedules, then there is the opportunity for greater access of the courses to students. Ideally, the districts may be able to add an advanced placement course for students.	FOR STAMFORD: Similarly, more flexibility, greater options for science instruction, and, if the BOCES option is instituted, then Stamford receives aid rather than paying directly to another district. Even if the share takes place with Jefferson without qualifying for BOCES aid, the share adds to the collaborative culture and collective resources of the two districts and may open other science opportunities for students.
MAJOR CHALLENGES OF SHARING	FOR JEFFERSON and FOR STAMFORD:	
	Analyzing and coordinating schedules to provide the most flexibility for both districts. Travel time of either faculty or students to the other district. If the BOCES shared itinerant service is pursued, there is need the for conversations with BOCES to see if current BOCES science staff numbers and seniority allow maintaining the Jefferson teacher as the fulltime shared itinerant (if that is the desire of the Jefferson Board.)	

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

STEPS NECESSARY BEFORE IMPLEMENTATION:	FOR JEFFERSON and FOR STAMFORD: Coordinate the schedules, review BOCES option with BOCES Superintendent, and if able to implement AP, contact AP for process necessary to train faculty member.	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	.60 salary of part time teacher: FICA (.0765): Retirement (.163): Health Insurance: Total current cost: \$.35 FTE contract cost with Roxbury Total current cost: \$
ESTIMATED SHARED FINANCIALS/COST	JEFFERSON	STAMFORD
	.625 of the total cost for the 1.0 FTE shared teacher Full time salary of the part time science teacher at Jefferson: FICA (.0765): Retirement (.163): Health Insurance: Total cost to implement:	.375 of the total cost for the 1.0 FTE shared teacher
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Total current cost:	Total current cost:
	.625 of cost to implement: \$.375 of cost to implement: \$
	Estimated Net Cost (+ or -): \$	Estimated Net Cost (+ or -): \$

SHARING OPPORTUNITY:	Advanced Art Course(s)
CATEGORY:	Secondary Program Elements
CURRENT METHOD OF DELIVERY:	Jefferson uses a 1.0 FTE teacher for K-12 art instruction—30 instructional periods in a 5-day week. Stamford uses a BOCES .4 itinerant for K-4 and a 1.0 FTE for 5-12 art instruction—42 instructional periods in a 5-day week. Grades 5 and 6 at Stamford receive art instruction 2 periods a week; K-4 receive art instruction 1 period per week.
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	<p>At Stamford: Grade 5 and 6 receive art instruction once a week like grades K-4. Therefore, with 10 grade level sections in grades K-6, 10 out of 42 are used for K-6 art instruction leaving 32 art instruction periods available for grades 7-12. Two instructional periods are allocated for grade 7-8 art; 20 weeks for four groups of about 15 pupils each. The remaining 30 instructional periods are available for either 6 year long art courses or 12 semester length art courses for grades 9-12 (or a combination of yearlong and semester length courses).</p> <p>Offer a one year-long advanced art course or two semester long advanced art courses; leaving 10 semester art courses to be offered at Stamford.</p> <p>Note: both districts may wish to consider pooling of resources for art instruction. Art supplies are expensive and if the two districts cooperated with purchasing of supplies, there is a potential to reduce costs through cooperative purchasing.</p>
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	FOR JEFFERSON and FOR STAMFORD: Advanced students proficient in art would now have the opportunity to take advanced art courses. This is advantageous to students who wish to enroll in highly competitive universities.

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

MAJOR CHALLENGES OF SHARING:	FOR JEFFERSON:	FOR STAMFORD:
	Transportation of art students to Stamford for the advanced art course. Mutual scheduling of the course.	For Stamford, need to creatively rework the elementary schedule for grades 5 and 6 for them to receive one art class per week like grades K-4. An opportunity is created with this option for advanced art. Yet, the study acknowledges that work might need to be done if the current second art class for grades 5 and 6 is used to provide classroom teachers with a contractually defined prep or 'free' period. If this is so, then other existing 'specials' might be used to provide prep periods for grade level teachers. Or, looking at the role of the library media specialist or possibly a teacher assistant in a computer lab might be worthy as a creative solutions. Mutual scheduling of the course.
STEPS NECESSARY BEFORE IMPLEMENTATION:	FOR JEFFERSON and FOR STAMFORD:	
	Survey of interest of art students. Training of Art teacher to implement AP instruction. Schedule time of course determined. Transportation of art students from Jefferson to Stamford.	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	Not offered.	Salary of the art teacher: FICA (.0765): Retirement (.163): Health insurance: Total: .167 (1/6 of an FTE) times Total current cost: \$
ESTIMATED SHARED FINANCIALS/COST:	JEFFERSON	STAMFORD
	The total cost for the Stamford art teacher (.167 times the total full time equivalent cost) is divided by the total number of pupils who enroll in the advanced art course to identify a cost per student.	
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Number of Jefferson students who enroll in the advanced art course times the course cost per student:	.167 times Total Current Cost: Minus total cost of enrollments for Jefferson pupils based on a cost per pupil.
	Estimated Net Cost: \$	Estimated Net Savings: \$
Suggestion	There is the possibility that on alternating years, the Jefferson art teacher teaches the advanced art course(s); and 1/6 of an art teacher from Stamford is assigned to teach elementary art at Jefferson allowing the Jefferson art teacher an instructional assignment to teach on a rotated basis the advanced course(s) for both districts.	

SHARING OPPORTUNITY:	Advanced Placement Courses and College Credit Courses in Core Curriculum Areas
CATEGORY:	Secondary Program Elements
CURRENT METHOD OF DELIVERY:	Neither school district offers advanced placement courses. Both secondary programs offer college courses for credit with partner higher education institutions.
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	Both school districts identify current staff in the English, social studies, science, math and language that have the skill sets and are willing to receive training to teach Advanced Placement Courses. Possibly five advanced placement courses can be offered to the pupils of both high schools. Students are transported from the home school to the sister district where the course is taught. (Same pattern is followed with shared college credit courses.)

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	FOR JEFFERSON and FOR STAMFORD:	
	Such advanced courses are an asset to students who wish to enroll in highly competitive universities.	
MAJOR CHALLENGES OF SHARING:	FOR JEFFERSON and FOR STAMFORD:	
	Survey of student interest and choices. Transportation of art students to Stamford for the AP art course. Mutual scheduling of the course(s). Courses offered either at the beginning of the school day or at the end have the best success in such collaborations. Usually transportation of students at such times of the day can be less challenging	
STEPS NECESSARY BEFORE IMPLEMENTATION:	FOR JEFFERSON and FOR STAMFORD:	
	Survey of students. Training of teachers to implement AP instruction. Schedule time of course determined. Transportation of students from the home school to the sister school where the course is located.	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	Salary of the core teacher: FICA (.0765): Retirement (.115): Health insurance: Total:	Salary of the core teacher: FICA (.0765): Retirement (.115): Health insurance: Total:
	.167 times Total current cost: \$.167 times Total current cost: \$
ESTIMATED SHARED FINANCIALS/COST:	JEFFERSON	STAMFORD
	The total cost for the respective teacher teaching the course (.167 times the total full time equivalent cost-1/6 of an FTE) is divided by the total number of pupils who enroll in the advanced course to identify a cost per student.	
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	(assumes an instructional FTE teaches six classes) .167 times Total Current Cost for each teacher instructing advanced courses: Minus total cost of enrollments for Stamford pupils based on a cost per pupil.	(assumes an instructional FTE teaches six classes) .167 times Total Current Cost for each teacher instructing advanced courses: Minus total cost of enrollments for Jefferson pupils based on a cost per pupil.
	Estimated Net Cost: \$	Estimated Net Cost: \$

COMBINED ELEMENTARY AND SECONDARY SHARING OPTION (PAGE 44):

Serve all of grades pre-K through grade 6 at the Jefferson building and serve all of grades 7-12 at the Stamford building.

The following data provide the framework for the rationale of this suggested option for consideration:

Elementary Grades Pre-K through Six:	
1. Enrollment estimate for K-6 combined of both districts in three years :	312 plus 18 Pre-K pupils
2. Elementary pupil capacity of the Jefferson building:	409
3. Used pupil capacity of the Jefferson building if grades pre-K through grade six were served together at the Jefferson building in three years :	330 or 80.7%
4. Unused pupil capacity, for flexibility and potential enrollment growth, of the Jefferson building if grades	79 or 19.3%

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

<p>pre-K through grade six were served together at the Jefferson building in three years:</p>	
<p>5. Elementary grade level section sizes in Jefferson in 2010-2011(as an example): Total of 7 sections.</p>	<p>Kindergarten: 1 with 22 pupils Grade 1: 1 with 18 pupils Grade 2: 1 with 17 pupils Grade 3: 1 with 21 pupils Grade 4: 1 with 22 pupils Grade 5: 1 with 15 pupils Grade 6: 1 with 25 pupils</p>
<p>6. Elementary grade level section sizes in Stamford in 2010-2011 (as an example): Total of 10 sections.</p>	<p>Pre-K: 1 with 18 pupils Kindergarten: 2 with 15 pupils each Grade 1: 1 with 18 pupils Grade 2: 1 with 24 pupils Grade 3: 1 with 22 pupils Grade 4: 1 with 20 pupils Grade 5: 2 with 14 pupils each Grade 6: 1 with 17 pupils Grade 6: 1 with 16 pupils</p>
<p>7. Estimated enrollments by grade level in three years (2013-2014) if both school districts combine to serve Pre-K through six in one building:</p>	<p>Pre-K: 18 Kindergarten: 40 Grade 1: 54 Grade 2: 56 Grade 3: 48 Grade 4: 34 Grade 5: 40 Grade 6: 40</p>
<p>8. Elementary grade level section sizes, as an example, if all grades pre-K through grade 6 pupils of both districts are served together at the Jefferson building in three years (2013-2014). Total of 16 sections; one fewer sections compared to 2010-2011. Total of 15 sections delivered in a multi-age approach; two fewer sections in number compared to 2010-2011.</p>	<p align="right">Pre-K: 1 with 18 pupils Kindergarten: 2 with 20 pupils each Grade 1: 3 with 18 pupils each Grade 2: 3 with 19 pupils each Grade 3: 2 with 24 pupils each Grade 4: 2 with 17 pupils each Grade 5: 2 with 20 pupils each Grade 6: 2 with 20 pupils each</p> <p>Or, multiage sections of: Pre-K: 1 with 18 pupils Kindergarten: 1 with 20 pupils Grades K/1: 3 sections with 19/19/18 pupils Grades 1 and 2: 3 sections with 20 pupils each Grades 2/3: 2 sections with 23/24 pupils Grade 3 and 4: 2 sections with 20 pupils each Grades 4/5: 2 sections with 22 pupils each Grades 5/6: 2 sections with 23 pupils each</p>
<p>9. Estimated enrollments by grade level in five years (2015-2016) if both school districts combine to serve Pre-K through six in one building:</p>	<p>Pre-K: 18 Kindergarten: 51 Grade 1: 48 Grade 2: 38 Grade 3: 52 Grade 4: 54 Grade 5: 48 Grade 6: 35</p>
<p>10. Elementary grade level section sizes, as an example, if all grades pre-K through grade 6 pupils of both</p>	<p align="right">Pre-K: 1 with 18 pupils Kindergarten: 3 with 17 pupils each</p>

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

<p>districts are served together at the Jefferson building in five years.</p> <p>Total of 15 sections; two fewer sections compared to the number in 2010-2011.</p> <p>Total of 14 sections delivered in a multi-age approach; three fewer sections in number compared to 2010-2011.</p>	<table> <tr><td>Grade 1:</td><td>2 with 24 pupils each</td></tr> <tr><td>Grade 2:</td><td>2 with 19 pupils each</td></tr> <tr><td>Grade 3:</td><td>2 with 26 pupils each</td></tr> <tr><td>Grade 4:</td><td>2 with 27 pupils each</td></tr> <tr><td>Grade 5:</td><td>2 with 24 pupils each</td></tr> <tr><td>Grade 6:</td><td>2 with 18 pupils each</td></tr> </table> <p>Or, multiage sections of: Pre-K: 1 with 18 pupils</p> <p>Kindergarten: 2 sections with 20 each Grades K/1: 2 sections with 23/24 pupils Grades 1 and 2: 2 sections with 22 pupils each Grades 2/3: 2 sections with 25/25 pupils Grade 3 and 4: 2 sections with 26 pupils each Grades 4/5: 2 sections with 23 pupils each Grades 5/6: 2 sections with 24 pupils each</p>	Grade 1:	2 with 24 pupils each	Grade 2:	2 with 19 pupils each	Grade 3:	2 with 26 pupils each	Grade 4:	2 with 27 pupils each	Grade 5:	2 with 24 pupils each	Grade 6:	2 with 18 pupils each																
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Grade 6:	2 with 18 pupils each																												
Secondary Grades Seven through Twelve:																													
11. Enrollment estimate for 7-12 combined of both districts in three years :	290																												
12. Secondary pupil capacity of the Stamford building:	474 (assuming that 8 out of the 11 elementary rooms are used for program delivery that qualifies for secondary pupil capacity)																												
13. Used pupil capacity of the Stamford building if grades seven through grade twelve were served together at the Stamford building in three years :	290 or 61.1%																												
14. Unused pupil capacity, for flexibility and potential enrollment growth, of the Stamford building if grades 7 through grade twelve were served together at the Stamford building in three years :	174 or 36.7%																												
15. Enrollment estimate for 7-12 combined of both districts in five years :	259																												
16. Secondary pupil capacity of the Stamford building:	474 (assuming that 8 out of the 11 elementary rooms are used for program delivery that qualifies for secondary pupil capacity)																												
17. Used pupil capacity of the Stamford building if grades seven through grade twelve were served together at the Stamford building in five years :	259 or 54.6%																												
18. Unused pupil capacity, for flexibility and potential enrollment growth, of the Stamford building if grades 7 through grade 12 were served together at the Stamford building in five years :	215 or 45.4%																												
<p>19. 7-12 instructional staff to serve 300 pupils assuming a class size goal of 20 pupils</p> <p>*assumes at least one advanced placement or college course taught by one or more FTE's</p>	<table> <tr><td>English</td><td>3.0 FTE's*</td></tr> <tr><td>Social Studies</td><td>3.0 FTE's*</td></tr> <tr><td>Mathematics</td><td>3.0 FTE's*</td></tr> <tr><td>Science/Health</td><td>4.0 FTE's*</td></tr> <tr><td>Business</td><td>1.0 FTE</td></tr> <tr><td>Language A</td><td>1.0 FTE*</td></tr> <tr><td>Language B</td><td>1.0 FTE*</td></tr> <tr><td>Vocal Music</td><td>1.0 FTE</td></tr> <tr><td>Instrumental Music</td><td>1.0 FTE</td></tr> <tr><td>Art</td><td>1.5 FTE</td></tr> <tr><td>Technology</td><td>1.0 FTE</td></tr> <tr><td>Home and Careers</td><td>1.0 FTE</td></tr> <tr><td>Resource Officer</td><td>1.0 FTE</td></tr> <tr><td>Media Librarian</td><td>1.0 FTE</td></tr> </table>	English	3.0 FTE's*	Social Studies	3.0 FTE's*	Mathematics	3.0 FTE's*	Science/Health	4.0 FTE's*	Business	1.0 FTE	Language A	1.0 FTE*	Language B	1.0 FTE*	Vocal Music	1.0 FTE	Instrumental Music	1.0 FTE	Art	1.5 FTE	Technology	1.0 FTE	Home and Careers	1.0 FTE	Resource Officer	1.0 FTE	Media Librarian	1.0 FTE
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JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS
CURRENT STAFFING AND STAFFING SUGGESTED BY THIS OPTION FOR SHARING

	JEFFERSON	STAMFORD	TOTAL FTE'S CURRENTLY	FTE'S SUGGESTED BY THIS SHARING OPTION	Remaining FTE's
ELEMENTARY PRE-K THROUGH GRADE SIX					
Pre-K	.25	.25	.5	.5	
K-6	7	10	17	16	1
K-6 self-contained special needs	1.5	1	2.5	2	.5
Physical Education	.6 (.6 BOCES itinerant)	1	1.6	2	
Vocal Music	.25	.5	.75	1	+.25
Instrumental Music		.5	.5	.5	
Art	.5	.6	1.1	1	.10
Reading		1	1	1	
Reading, Math, AIS	1		1	1	
Librarian	.4	.5	.9	1	+.10
Guidance Counselor	.5	1	1.5	1	.5
Itinerant through BOCES services as needed: Speech Therapist Physical Therapist Occupational Therapist Psychologist		As needed As needed As needed As needed		As needed As needed As needed As needed	
Psychologist	.05		.05	.05	
Nurse	.5	.5		1	
Pre-K through 12 principal Pre-K through 6 principal	.5	.5	1		
Teacher Assistants				1	
Pre-K	.5	.5	1	1	
K-6	4	6	10	7	3
Special Needs in self-contained Resource Room Reading Library Assistant Computer Assistant		3.5 1 1 1 1	3.5 1 1 1 1	2 1 1 1 1	1.5*

* subject to IEP determinations for 1 to 1 aides

	JEFFERSON	STAMFORD	TOTAL FTE'S CURRENTLY	FTE'S SUGGESTED BY THIS SHARING OPTION	Remaining FTE's
SECONDARY GRADES 7-12					
English	2	2.5	4.5	3	1.5
Social Studies	2	2.5	4.5	3	1.5
Math	1.8	2	3.8	3	.8
Science	1.80	2.35	4.15	4	.15
Language	1	1	2	1	1
Self-Contained Special Needs	1.5	2	3.5	2	1.5
Inclusion special ed teacher		1	1	1	
Reading and Math AIS		1	1	1	
Vocal Music	.25	.5	.75	1	+.25
Instrumental Music	1	.5	1.5	1	.5
		.9 plus .4			

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

Art	.5	BOCES itinerant	1.8	1.5	.30
Technology	1	1	2	1	1
Physical Education	1	1	2	2	
Health	.4	.2	.6	1	+.40
Business	1	1	2	1	1
Home and Careers	1	1	2	1	1
Guidance Counselor	.5	1	1.5	1.5	
Librarian	.4	.5	.9	1	+.10
Itinerant through BOCES services as needed:					
Speech Therapist		As needed		As needed	
Physical Therapist		As needed		As needed	
Occupational Therapist		As needed		As needed	
Psychologist		As needed		As needed	
Psychologist	.05		.05	.05	
Nurse	.5	.5		1	
Pre-K through 12 principal					
7 through 12 principal	.5	.5	1	1	
Teacher Assistants					
Special Needs in self-contained	1		1	1	
Resource Room	1		1	1	
Library Assistant		1	1	1	
	JEFFERSON	STAMFORD	TOTAL FTE'S CURRENTLY	FTE'S SUGGESTED BY THIS SHARING OPTION	Remaining FTE's
Study Hall Monitor (Aide)	1		1	1	
Structured Study Hall TA		1	1	1	
Distance Learning Aide		1	1	1	
Resource Officer				1	+1

* subject to IEP determinations for 1 to 1 aides

SHARING OPPORTUNITY:	Serve the pre-K through grade 6 pupils of both districts at the Jefferson building and serve grades 7 through grade 12 pupils of both districts at the Stamford building
CATEGORY:	Elementary and Secondary Program Elements
CURRENT METHOD OF DELIVERY:	Each district presently serves grade K-12 pupils separately in two buildings with shared pre-K served at the Stamford building
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	<ul style="list-style-type: none"> In the initial first year of implementing this sharing opportunity, each district implements the usual pupil transportation routing: that is, all pupils of Stamford are bused to Stamford, all pupils of Jefferson are bused to Jefferson. Pre-K through grade 6 pupils of Stamford (about 160 or 3 buses) are shuttled to Jefferson. Grades 7 through 12 pupils of Jefferson (about 139 or 3 buses) are shuttled to Stamford. Shuttling should take about 15 to 20 minutes. During this 'shuttle' time the 7-12 pupils already at Stamford are provided pre-school day supervised activity (including a breakfast program); similarly the Pre-K through grade 6 pupils already at Jefferson are provided pre-school day supervised activity (including a breakfast program). During the first year, transportation routing of both districts is analyzed to determine if minor adjustments can be made to reduce the number of pupils that need to be shuttled to and from the pre-K-6 school at Jefferson and the 7-12 school at Stamford. For year two, it is suggested that one routing plan be developed such that the combined fleet of buses of both school districts are used to implement one combined district route for grades Pre-K through 6 such that the pupils are transported directly to Jefferson eliminating the shuttle from Stamford; and

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

	<p>that a second combined district route is implemented such that all 7-12 pupils are transported directly to Stamford eliminating the shuttle from Jefferson. Such a routing plan might require more buses to ensure that no pupil is on a bus longer than 1 hour. The Jefferson school district contains 70.13 square miles and the Stamford school district contains 45.93 square miles. Such a two route pick-up plan can allow two school day schedules; one with an earlier start time for grades 7-12 and one with a later start time for grades pre-K through six which is often the pattern in school districts with two pick up district routing plans.</p> <ul style="list-style-type: none"> • Graduating seniors of the Stamford district receive a Stamford diploma; graduating seniors of the Jefferson district receive a Jefferson diploma. • All sports teams and clubs continue as they have by both school districts; when low pupil participation in a sport or club occurs, the districts should explore offering the sport or club in combination if appropriate. • Staffing of each school building is as suggested on the previous charts under “FTE’S SUGGESTED BY THIS SHARING OPTION” • In those staff categories where there is more staff than is needed with this program implementation option, the districts decide together which district will reduce FTE’s according to Ed Law guidelines and the seniority list specific to a respective school district. • Staff employed by Jefferson fall under the labor agreements in place by Jefferson; staff employed by Stamford fall under the labor agreements in place by Stamford. • The two Boards of Education work together to: <ul style="list-style-type: none"> ◊ Prepare a common student conduct policy ◊ Approve a common Pre-K through grade 6 and a grade 7 through grade 12 curriculum ◊ With the recommendation of the superintendents with the advice of both faculties, common textbooks are approved for Pre-K-6 and grades 7-12. ◊ Prepare a common school year calendar. • The basis of the cost shares are only <i>direct instructional delivery costs</i>. All other costs like school lunch, transportation, central offices, clerical support, maintenance of the buildings, utilities, insurance, unshared athletics or clubs, and other school district expenses are the responsibility of each separate school district unless mutually agreed to differently by both school districts. The cost for placements of pupils with special needs outside of the home district is at the individual expense of each district separately and is not a shared expense.
<p>MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:</p>	<p>FOR JEFFERSON and FOR STAMFORD:</p> <ul style="list-style-type: none"> ✓ An elementary program that can offer at least two sections at each grade level to ensure equity of program delivery and a ‘volume’ of professional skill sets to address individual differences of pupils with more tools and strategies. ✓ A secondary program that can offer a comprehensive set of course offerings on an annual basis that could not be offered separately to two shrinking high school enrollments at both school districts. ✓ The ‘power’ of professional collaboration, skill, talent, and problem solving ability of two school buildings; one just focusing on elementary children and one just focusing on secondary pupils ✓ The ability to offer an elementary program and a secondary program in a shared manner that <i>reduces the cost</i> to deliver the programs and <i>increases learning opportunities</i> for all pupils Pre-K through grade 12. ✓ Both school districts are legally intact.
<p>MAJOR CHALLENGES OF SHARING:</p>	<p>FOR JEFFERSON and FOR STAMFORD:</p> <ul style="list-style-type: none"> ✓ Instituting the shuttle of respective grade level pupils to the school buildings. ✓ Collaboration concerning student conduct policy, a common curriculum, textbook approval, and a common calendar. ✓ The reality that instructional staff and instructional support staff will be working side-by-side and governed by different employment labor contracts.
<p>STEPS NECESSARY BEFORE IMPLEMENTATION:</p>	<p>FOR JEFFERSON and FOR STAMFORD:</p> <ul style="list-style-type: none"> ✓ Clear communication with the communities of both school districts. ✓ Setting a school-day-schedule that accommodates the shuttling of the respective sets of pupils to either the elementary building at Jefferson or the secondary building at Stamford. Developing meaningful, supervised pre-school day activity at both buildings for pupils during the 15 to 20 minute shuttle bus time for other pupils.

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	<ul style="list-style-type: none"> ✓ Collaboration concerning student conduct policy, a common curriculum, textbook approval, and a common calendar. ✓ Education of all segments of faculty and staff regard to the similarities and differences of labor employment contracts that govern the subsets of staff who come together with a common purpose of servicing pupils of the two school districts in combination. ✓ Prepare a written contract or memo of understanding outlining the share. Suggest a duration of at least one to two years if possible. 	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	current salaries of all instructional staff Pre-K through grade 12: current salaries of all instructional support staff Pre-K through grade 12: FICA (.0765): Retirement (.115): Retirement (.163): Health insurance: instructional equipment: instructional supplies:	current salaries of all instructional staff Pre-K through grade 12: current salaries of all instructional support staff Pre-K through grade 12: FICA (.0765): Retirement (.115): Retirement (.163): Health insurance: instructional equipment: instructional supplies:
	Total current cost: \$	Total current cost: \$
ESTIMATED SHARED FINANCIALS/COST:	<p>Grades Pre-K through 6 Program: salaries of all instructional staff proposed by staffing plan: salaries of all instructional support staff proposed by staffing plan: FICA (.0765): Retirement (.115): Retirement (.163): health insurance: instructional equipment: instructional supplies:</p> <p align="center"><i>Total cost to implement the sharing Pre-K through 6 option:</i></p> <p>Grades 7 through 12 Program: salaries of all instructional staff proposed by staffing plan: salaries of all instructional support staff proposed by staffing plan: FICA (.0765): Retirement (.115): Retirement (.163): Health insurance: instructional equipment: instructional supplies:</p> <p align="center"><i>Total cost to implement the sharing 7 through 12 option:</i></p>	
	JEFFERSON	STAMFORD
	Direct Instructional Cost per Pre-K through grade 6 student served based on total elementary enrollment at the Jefferson building based on a pre-determined date (suggest May 1): Direct Instructional Cost per grade 7 through grade 12 student served based on total secondary enrollment at the Stamford building based on a pre-determined date (suggest May 1)	Direct Instructional Cost per Pre-K through grade 6 student served based on total elementary enrollment at the Jefferson building based on a pre-determined date (suggest May 1): Direct Instructional Cost per grade 7 through grade 12 student served based on total secondary enrollment at the Stamford building based on a pre-determined date (suggest May 1):
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Number of Jefferson CS pupils on May 1 who are served by the pre-k through grade 6 program at the Jefferson building <i>times the per</i>	Number of Stamford CS pupils on May 1 who are served by the pre-k through grade 6 program at the Jefferson building <i>times the per</i>

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	<i>pupil cost to deliver the program:</i> Plus Number of Jefferson CS pupils on May 1 who are served by the grade 7 through 12 program at the Stamford building <i>times the per pupil cost to deliver the program:</i>	<i>pupil cost to deliver the program:</i> Plus Number of Stamford CS pupils on May 1 who are served by the grade 7 through 12 program at the Stamford building <i>times the per pupil cost to deliver the program:</i>
	Minus Current Cost to Implement without sharing:	Minus Current Cost to Implement without sharing:
	Estimated Net Cost (+ or -): \$	Estimated Net Cost (+ or -): \$

The combined elementary program scenario at one site estimates 6.1 fewer FTE’s—1.6 instructional and 4.5 instructional support--- than the total FTE’s currently on staff at Jefferson and Stamford combined. The combined elementary scenario is estimated to cost \$211,750 less than the resources to provide the elementary program separately.

Depending upon which instructional delivery method is used—standard grade level sections or multi-age level sections—it is expected that 1 to 2 fewer FTE’s can be estimated for 2013-2014; and an additional 1 to 2 fewer FTE’s estimated for 2015-2016. Estimated reduction of cost of \$55,000 to \$110,000 in 2013-2014 and an additional estimated reduction of cost of \$55,000 to \$110,000 in 2015-2016. *

The combined secondary program scenario at one site estimates 8.50 fewer FTE’s than the total FTE’s currently on staff at Jefferson and Stamford combined. The combined secondary scenario hosted in one building is estimated to cost \$550,082 less than the resources to provide the secondary program separately in two buildings.

**Until an accurate seniority list is developed and applicable tenure area laws are applied, the specific savings attributed to reduced staff is unknown. The study conservatively uses \$55,000 to estimate the expense for one instructional FTE and \$27,500 for one instructional support FTE. For example at Jefferson a first year instructional FTE may cost \$39,000 in salary; \$2984 in FICA; \$4485 for retirement; plus \$4800 for an individual health plan or \$12,800 for a family health plan. A total for a first year FTE then ranges between \$51,269 and \$59,269. If reduced staff are FTE’s with more longevity, then the savings are higher. The expense for possible unemployment insurance payments is also a factor. Therefore, to estimate conservatively possible savings from sharing and thus reducing staff FTE’s is prudent. In all likelihood the savings will exceed the estimates listed.*

INSTRUCTIONAL PROGRAM LEADERSHIP/SUPERVISION SHARING OPTIONS (PAGE 53)

SHARING OPPORTUNITY:	CSE Chairperson/Supervisor	
CATEGORY:	Instructional Program and Staff Supervision	
CURRENT METHOD OF DELIVERY:	Each district presently has a CSE Chairperson who also has teaching duties associated with their position.	
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	One CSE Chairperson/Supervisor for both districts. This person would be responsible for overseeing the special education programs of both districts, including chairing CPSE and CSE meetings. Also would be responsible for completing special education data forms and evaluating special education staff; requires the person to have administrative certification.	
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	FOR JEFFERSON: Allows for this person to focus entirely on the special education program from an administrative viewpoint without teaching responsibilities. This individual could better analyze the range of offerings for students and provide recommendations for services, including possibilities for more on-site programs. Will help to implement the Annual Performance Professional Review.	FOR STAMFORD: Also, allows for a more focused approach and can better assist the district to improve its special education results. By overseeing both districts, this person could better analyze opportunities that could be available by using the resources of both districts to improve services to students in the most cost effective manner possible. Will help to implement the Annual Performance Professional Review.
MAJOR CHALLENGES OF SHARING:	FOR JEFFERSON: Would have to analyze the teaching load to determine how responsibilities could be apportioned to the various staff. (The present	FOR STAMFORD: Working with present staff to improve the opportunities for all special education students in order to meet NYS special education

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	CSE Chairperson has teaching responsibilities.) Also would have to review with Stamford their philosophies re: special education instruction in order to best coordinate both districts' programs.	standards. The district has been under review for special education results and this could be a strong opportunity to help move this process forward.
STEPS NECESSARY BEFORE IMPLEMENTATION:	FOR JEFFERSON and FOR STAMFORD: Analyze the number of special education classes or resource room services needed to serve the special needs pupils. If there is substantiated need, then the current staff person would be assigned to a full time teaching load in lieu of .5 FTE as CSE chair. If there is not a substantiated need for an additional .5 teacher, then .5 FTE could be reduced.	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	.5 of current salary: FICA (.0765): Retirement (.115): .5 Health insurance:	.5 of current salary: FICA (.0765): Retirement (.115): .5 Health insurance:
	Total current cost: \$	Total current cost: \$
ESTIMATED SHARED FINANCIALS/COST:	Estimated Salary of a fulltime Special Education Supervisor/CSE chair: \$50,000	
	FICA (.0765):	3825
	Retirement (.115):	5751
	Health insurance:	15,500
	Total estimated cost: \$75,076	
	JEFFERSON	STAMFORD
	.50 times total estimated cost: \$37,538	.50 times total estimated cost: \$37,538
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Total Current Cost:	Total Current Cost:
	Total Estimated Cost to Implement:	Total Estimated Cost to Implement:
	Estimated Net Savings: \$	Estimated Net Savings: \$
Suggestion:	It is suggested the districts should get an estimate from the BOCES for this shared Special Education Supervisor service for comparison.	

SHARING OPPORTUNITY:	Shared Superintendent of Schools
CATEGORY:	Instructional Program and Staff Supervision/Leadership
CURRENT METHOD OF DELIVERY:	Each school district has a superintendent of schools.
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	Ed Law 1527-c of 2011 allows a school district with an enrollment of less than 1000 pupils to enter into a school superintendent sharing contract with no more than two additional school districts each of which has fewer than 1000 enrolled pupils. The shared superintendent arrangement is governed by the boards of education of the school districts participating in the shared contract.; provided that Ed Law 1527-c shall not be construed to alter, affect or impair any employment contract which is in effect on or before July 1, 2013.
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	FOR JEFFERSON and FOR STAMFORD:
	Lower cost in achieving the district leadership responsibility of a superintendent of schools. One leadership voice might mitigate barriers to the range of ideas for sharing between the two low enrollment districts.
MAJOR CHALLENGES OF SHARING:	FOR JEFFERSON and FOR STAMFORD:
	The school districts have been diligent in the number and use of available leadership/administrative/supervisory personnel to accomplish the many tasks and 'hats' normally expected for any school district. It is suggested that both districts currently have the

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

	<p>appropriate minimum number of administrative FTE's for districts of their sizes. A shared superintendent reduces the leadership/administrative/supervisory skill sets available in each district. For example, currently the superintendent is 'back-up' for principals who are ill or out of the building on school district matters. Instituting the Annual Performance Professional Review process will probably be a challenge without possibly the help of a shared service from BOCES or other school partner to implement the review process in both districts. The Boards will need to become accustomed to not necessarily having the superintendent a phone call away or available for a quick visit to the school district central office. There would be the need for close planning and compromise concerning when board meetings, planning sessions, and other special meetings are scheduled in both districts. Current Board of Education and community expectations and values about the superintendent being present for community activities, athletic contests, and other student evening/weekend activities may need to be re-evaluated. A plan and process to have the superintendent available for communication with community members will need to be defined to ensure accessibility, open public service, clear communication, and physically 'doable' by one superintendent. The role of the business official and others may need to be adjusted to ensure that when the superintendent is not physically in the one district, that that district has procedures and authority in place to ensure the health and safety of students and staff. In addition, such services as State Aid Planning from the Questar BOCES should be a tool subscribed to by both school districts. Both districts would need to re-define the role of the superintendent at direct table negotiations. The use of an outside labor relations service is recommended. It is not suggested that the shared superintendent have a direct at table negotiations role with labor units; instead a caucus role for the superintendent and board members (if any) would be implemented. The culture of both districts would have to be developed that the shared superintendent is an advocate and leader for both districts with no bias toward one over the other. Another challenge is finding the right candidate who can perform the duties of a shared superintendent with stamina, leadership strength, board relations skills, personnel leadership skills, pupil advocacy skills, and community communication skills. In addition, a shared superintendent will be professionally responsible for administrating two sets of board policies, and two sets of labor contracts.</p>					
<p>STEPS NECESSARY BEFORE IMPLEMENTATION:</p>	<p>FOR JEFFERSON and FOR STAMFORD: Depending upon the expiration of current contracts with the superintendents, deciding when a sharing could begin. Identifying a superintendent to assume the role of a shared superintendent. Crafting an employment contract and talking out the cultural expectations for the role of the superintendent discussed on major challenges.</p>					
<p>CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:</p>	<p align="center">JEFFERSON</p> <p>current salary: FICA (.0765): Retirement (.115): Health insurance:</p> <p align="right">Total current cost: \$</p>	<p align="center">STAMFORD</p> <p>of current salary: FICA (.0765): Retirement (.115): Health insurance:</p> <p align="right">Total current cost: \$</p>				
<p>ESTIMATED SHARED FINANCIALS/COST: Shared Superintendent of Schools</p>	<p align="center">Estimated Salary of a fulltime shared superintendent:</p> <p>At least 1.25 times the traditional salary paid by the districts for a superintendent: FICA (.0765): Retirement (.115): Health insurance:</p> <p align="right">Total estimated cost: \$</p> <table border="1" data-bbox="456 1755 1524 1814"> <tr> <td align="center">JEFFERSON</td> <td align="center">STAMFORD</td> </tr> <tr> <td>.50 times total estimated cost:</td> <td>.50 times total estimated cost:</td> </tr> </table>		JEFFERSON	STAMFORD	.50 times total estimated cost:	.50 times total estimated cost:
JEFFERSON	STAMFORD					
.50 times total estimated cost:	.50 times total estimated cost:					
<p>ESTIMATED NET FINANCIALS IF IMPLEMENTED:</p>	<p align="center">JEFFERSON</p> <p>Total Current Cost: Minus Total Estimated Cost to Implement:</p>	<p align="center">STAMFORD</p> <p>Total Current Cost: Minus Total Estimated Cost to Implement:</p>				

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	Estimated Net Cost (+ or -): \$	Estimated Net Cost (+ or -): \$
Suggestion:	<p>It is advised that the districts engage a resource to facilitate the planning and discussions of both Boards of Education if they choose to pursue this sharing opportunity. The BOCES District Superintendent is a good resource. The work of the District Superintendent in such matters is at no cost to the school districts. There are also quality compensated resource person who can facilitate the discussions. Certainly, the Boards will need an attorney to work with the candidate's attorney to craft the employment contract. All decisions are the responsibility of both Boards of Education collaboratively. It is suggested that a shared superintendent not be instituted unless done so unanimously by both Boards of Education. Another suggestion to consider is that if the candidate is one of the currently sitting superintendents, then the two boards may wish to have a contract between the boards. The heart of that contract outlines a process where the district of the current superintendent may end the sharing arrangement with the neighboring district with ample notice and return the shared superintendent to serve again the single district. The shared superintendent's contract will need to reflect the contract between the two boards if this suggestion is implemented. As simple as the idea of shared superintendent sounds, it is not about the <i>mechanics</i> of what a superintendent is expected to accomplish. We suggest it is about advocacy for children; achievement of learning standards for all children; responsible use of available financial and human resources to serve children; interpersonal communication with all stakeholders; expecting and driving for consensus about a clear vision of what the community expects for the education of their children; professionalism and conviction in dealing with labor unions; and other related leadership elements. The idea of haring a superintendent does make sense mechanically. Reorganizing schools through merger or annexation also makes sense mechanically. However, only after careful planning, discussion, collaboration, and a clear definition of goals do school districts enter the ultimate sharing option of reorganization. It is suggested that the same diligence be followed in the potential implementation of a shared superintendent between two legally separate school districts.</p>	

INSTRUCTIONAL SUPPORT PROGRAM SUPERVISION SHARING OPTIONS (PAGE 57)

SHARING OPPORTUNITY:	Shared Cafeteria Management	
CATEGORY:	Instructional Support	
CURRENT METHOD OF DELIVERY:	Each district presently has their own cafeteria manager who manages all aspects of the cafeteria services.	
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	<p>Instead of two separate managers, one manager supervises the breakfast/school lunch programs of both districts. The supervisor oversees the programs and is responsible for nutritious menu planning, hiring, staff evaluations, ordering of supplies and handling the districts' free and reduced lunch data processes. In addition, the shared position would analyze number of meals per staff labor hour to ensure that staffing levels meet the expected norms for how much staff is necessary to serve the number of meals to pupils who now purchase breakfast/lunch. A current cafeteria staff member is named 'head cook' to make a range of 'at the moment decisions' when the shared cafeteria manager is geographically at the other school district location. The person is also responsible to investigate other sharing opportunities like: centralized baking; full-use of the regional bid for cafeteria food and supplies; the sharing of freezer space at both sites on behalf of both districts; collaborative pick up of government foods from the regional distribution site. A common daily school breakfast and school lunch menu is served at both school districts (with flexibility for 'locally favorite recipes') in order to efficiently prepare and purchase necessary food supplies in volume.</p>	
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	<p>FOR JEFFERSON and FOR STAMFORD: Usually volume of meals allows for a more successful planning of nutritious meals. The share will help reduce the reliance on taxpayer dollars to subsidize the school breakfast/lunch program. In 2011-2012 the Jefferson general fund subsidizes the school lunch fund with \$ 20,000; the Stamford general fund subsidizes the school lunch fund by \$30,000. The shared position will</p>	

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

	likely identify other ways to share as describe above that will decrease the reliance on general fund taxpayer support of the school lunch programs and increase quality for students and/or better use existing resources so the cost of lunches and breakfasts can be held more steady in this every changing economy for commodities.	
MAJOR CHALLENGES OF SHARING:	FOR JEFFERSON and FOR STAMFORD: The cafeteria manager will not always be at the school location during breakfast or lunch (will be at the other school district on a rotating or other scheduled basis). Excessing one or both of the current school lunch supervisors and working with the county civil service to craft a job description of a "School Lunch Supervisor" or School Lunch Manager".	
STEPS NECESSARY BEFORE IMPLEMENTATION:	FOR JEFFERSON and FOR STAMFORD: Working with the county civil service office to review the current titles of the current staff. Deciding which title the shared position should be with civil service; i.e. one of the current titles or one of a higher level given the responsibility for managing two school lunch programs on a shared basis. Determining if BOCES can provide the shared service thus generating BOCES aid for both school districts.	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	current salary: FICA (.0765): Retirement (.163): Health insurance:	current salary: FICA (.0765): Retirement (.163): Health insurance:
	Total current cost: \$	Total current cost: \$
ESTIMATED SHARED FINANCIALS/COST	Estimated Salary of a fulltime School Lunch Manager: \$30,000 FICA (.0765): 2,295 Retirement (.163): 4,891 Health insurance: 15,500 Total estimated cost: \$52,686	
	JEFFERSON	STAMFORD
	.50 times total estimated cost: \$26,343	.50 times total estimated cost: \$26,343
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Total Current Cost:	Total Current Cost:
	Minus Total Estimated Cost to Implement: \$26,343	Minus Total Estimated Cost to Implement: \$26,343
	Estimated Net Cost (+ or -): \$	Estimated Net Cost (+ or -): \$
Suggestion:	It is suggested the districts should get an estimate from the BOCES for this shared School Lunch Supervisor service for comparison. The BOCES aid can on the shared position can be allocated to the school lunch fund, thus helping to reduce the current dependence on property tax dollars to subsidize the school lunch program at each school district. In addition, one of the first projects for the shared supervisor is a study that: one, identifies the total cost per lunch; and two identifies the number of lunches prepared based on each hour of paid personnel time. Such a study will likely identify possible actions that can reduce the cost for delivering each lunch and how the quality of the meals can be enhanced. For example, a central preparation kitchen at one of the school districts probably will bring efficiencies of cost that can be translated to providing more food commodities at a higher quality level. A major challenge is that both school districts now contribute tax dollars for each food program to exist.	

SHARING OPPORTUNITY:	Shared Transportation Supervisor
CATEGORY:	Transportation Program and Staff Supervision
CURRENT METHOD OF DELIVERY:	Each district presently runs two separate and distinct programs. Each has a transportation supervisor who oversees the bus fleet and transportation program. Stamford employs a .6 FTE for 12 months and Jefferson employs a 1.0 FTE for 11 months who also is a cafeteria cashier for an additional stipend.

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WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	Instead of two separate supervisors, one supervisor oversees and coordinates the transportation department, supervises transportation staff and oversees the bus fleet of both districts and works from one bus garage facility. The supervisor is responsible for the fleet, transportation routes, bus maintenance, bus inspections, parts procurement; recruitment, hiring, training and evaluations and staff development of bus drivers and mechanics along with SED and DOT reporting systems. The supervisor also is responsible to seek additional means of saving money or sharing opportunities. These can include, but not be limited to, using a BOCES service for parts procurement; consolidating bus runs, special education runs, field trips and sports runs where possible; making sure that all buses run at maximum capacity; consolidating all transportation functions in one facility; staffing the bus garage with appropriate number of mechanics; purchasing fuel at state bid price.	
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	FOR JEFFERSON and FOR STAMFORD: Any reduction in support services costs without reducing services to students can transfer the savings to instructional use. In addition to those cited above, consolidating and/or coordinating bus runs may save money.	
MAJOR CHALLENGES OF SHARING:	FOR JEFFERSON and FOR STAMFORD: There are more transportation department staff for supervision by one person than in the current arrangement. Sharing services such as this requires a change in mindset and the 'status quo.'	
STEPS NECESSARY BEFORE IMPLEMENTATION:	FOR JEFFERSON and FOR STAMFORD: Work with the county civil service office to review the current titles and deciding on a title and civil service test. Resolve any local political and/or labor relations issues. Asserting the 'political will' to engage in the shared service. Decide which district should be the employer of the position; or work with the BOCES to hire the position as a shared position. Such a position is provide through a 'transportation contract' by BOCES which qualifies for transportation aid and not BOCES aid.	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	<p align="center">JEFFERSON</p> current salary: FICA (.0765): Retirement (.163): Health insurance: Total current cost: \$	<p align="center">STAMFORD</p> current salary: FICA (.0765): Retirement (.163): Health insurance: Total current cost: \$
ESTIMATED SHARED FINANCIALS/COST:	Estimated Salary of a fulltime Transportation Supervisor: \$30,000 FICA (.0765): 2,295 Retirement (.163): 4,891 Health insurance: 15,500 Total estimated cost: \$52,686	
	<p align="center">JEFFERSON</p> .50 times total estimated cost: \$24,843	<p align="center">STAMFORD</p> .50 times total estimated cost: \$24,843
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	<p align="center">JEFFERSON</p> Total Current Cost: Minus Total Estimated Cost to Implement: \$26,343 Estimated Net Cost (+ or -): \$	<p align="center">STAMFORD</p> Total Current Cost: Minus Total Estimated Cost to Implement: \$26,343 Estimated Net Cost (+ or -): \$

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

SHARING OPPORTUNITY:	Shared Supervisor of Buildings and Maintenance	
CATEGORY:	Instructional Support	
CURRENT METHOD OF DELIVERY:	Each district employs a 'working' School Buildings Operation and Maintenance Supervisor. Stamford has four building maintenance support staff. Jefferson has 3.05 FTE provided by four building maintenance support staff.	
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	One 'Working' Supervisor of Buildings and Grounds supervises the building cleaning and maintenance programs for both school districts. One supervisor oversees the O & M department and program of both districts. The supervisor oversees the cleaning of all district facilities; the maintenance of the building infrastructure; mowing the fields and plowing the parking lots, procurement of O & M materials and supplies; recruiting, hiring, training, evaluation and staff development of members of the department; overseeing the risk management programs including routine inspections such as fire inspections; assists the district in its long-range facilities plan and the like. The supervisor is also responsible to seek additional means of saving money or sharing opportunities. These can include, but not be limited to, using a BOCES service procurement; sharing O & M services and equipment; bulk purchasing through bidding of cleaning supplies; coordinating bidding of such common contracts as rentals, rugs, elevator service; coordinating all O & M management functions; seeking methods of reducing energy costs; purchasing fuel oil and natural gas at state bid prices; coordinating purchases with the towns.	
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	<p>FOR JEFFERSON and FOR STAMFORD:</p> <ul style="list-style-type: none"> ✓ Any reduction in support services costs without reducing services to students can transfer the savings to instructional use; or, ✓ Use the mutually saved funds to share a new position of <i>Senior Building Mechanic</i> that has the skills for plumbing, electrical, HVAC or carpentry; or, ✓ Purchase shared large equipment to better maintain and protect the investment of the communities in the current facilities; or, ✓ Use the mutually saved funds to bid out snow plowing of driveways and roadways of both school districts. Snow removal of sidewalks and stairs remain the responsibility of the district maintenance employees. The private vendor contract for snow removal may be listed as a transportation expense and qualifies for transportation aid. Also, bid out lawn care for the spring and summer. Such a contract approach relieves existing employees to spend more of their skills, talent, and time on cleaning and maintaining the buildings. 	
MAJOR CHALLENGES OF SHARING	<p>FOR JEFFERSON and FOR STAMFORD:</p> <p>The shared supervisor will supervise more staff members in a shared model than in the current separate district model. Sharing services such as this requires a change in mindset and the 'status quo.' The shared supervisor should have facility and trades knowledge as well as good interpersonal communication skills.</p>	
STEPS NECESSARY BEFORE IMPLEMENTATION:	<p>FOR JEFFERSON and FOR STAMFORD:</p> <p>Work with the county civil service office to review the current titles and deciding on a title and civil service test. Resolve any local political and/or labor relations issues. Asserting the 'political will' to engage in the shared service. Decide which district should be the employer of the position. Shared positions related to facility maintenance are not an allowed shared service under the Commissioner's guidelines for shared services. Prepare a contract between the two districts that outlines the share arrangement.</p>	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	current salary: FICA (.0765): Retirement (.163): Health insurance:	current salary: FICA (.0765): Retirement (.163): Health insurance:
	Total current cost: \$	Total current cost: \$

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

ESTIMATED SHARED FINANCIALS/COST:	Estimated Salary of a fulltime Supervisory of Building and Grounds: \$	
	FICA (.0765):	
	Retirement (.163):	
	Health insurance:	
	Total estimated cost:	
	Estimated cost for <i>additional</i> resources for caretaking of the public investment in the current facilities:	
	JEFFERSON	STAMFORD
	.50 times total estimated cost:	.50 times total estimated cost:
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Total Current Cost:	Total Current Cost:
	Minus Total Estimated Cost to Implement: \$	Minus Total Estimated Cost to Implement:
	Plus the share cost of ideas to <i>add</i> building services resources as discussed above or other ideas:	Plus the share cost of ideas to <i>add</i> building services resources as discussed above or other ideas: \$
	Estimated Net Cost (+ or -): \$	Estimated Net Cost (+ or -): \$

INSTRUCTIONAL SUPPORT PROGRAM SHARING OPTIONS (PAGE 62)

SHARING OPPORTUNITY:	Shared Bus Garage and Vehicle Maintenance	
CATEGORY:	Instructional Support	
CURRENT METHOD OF DELIVERY:	Jefferson contracts its bus maintenance with a private vendor. Jefferson has 8 full sized buses plus two car/vans. Stamford as a bus garage about midway between Jefferson and Stamford where one bus mechanic employed by the district maintains the buses. Stamford has 10 full sized buses and three car/vans.	
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	The bus mechanic is assigned to bus mechanic duties only. A mechanic's helper is added to work with the bus mechanic. The two employees are responsible for the maintenance of 18 full-sized school buses and 5 car/vans and are employees of the Stamford school district. All bus parts, oil, tires and other items necessary for bus maintenance are purchased separately by each district for their respective fleet. Bus repairs and maintenance is scheduled based on priority of repair and the pre-determined bus maintenance and bus inspection schedule for the year. The simplest model to share labor and bus garage building costs with equity has Stamford contributing 55.6 % of the total cost (total Stamford full size fleet divided by total combined full sized fleet with Jefferson) and Jefferson contributing 44.4% of the total cost (total Jefferson full sized fleet divided by total combined full sized fleet with Stamford).	
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	FOR JEFFERSON:	FOR STAMFORD:
	More long-term control of labor costs compared to using a private vendor. More control of quality control of bus maintenance and DOT inspections. A more comprehensive stable source of expertise for bus maintenance.	Utilizing the talents of two bus maintenance employees focused on bus maintenance. Sharing the cost of operating the bus garage. Sharing and paying for the skill sets of two mechanics at a mechanic to bus ratio closer to industry standards
MAJOR CHALLENGES OF SHARING	FOR JEFFERSON and FOR STAMFORD:	
	Creating the culture and the professionalism that the bus garage is the place where school buses are repaired and maintained with no priority or bias based on what name is on the vehicle.	
STEPS NECESSARY BEFORE IMPLEMENTATION:	FOR JEFFERSON and FOR STAMFORD:	
	Prepare a contractual agreement between both districts for the share. Jefferson is advised as to what parts inventory it must secure to be housed at the bus garage. In addition to labor, Jefferson pays a parts procurement stipend, a DOT facility inspection fee, and a 25% mark-up for in stock	

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

parts that need to be used. Jefferson procures bus parts directly and ships the parts to the vendor.		
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	Labor rate July-Dec. 2009: \$35 Labor rate Jan.-June 2010: \$45 Labor rate 2010-2011: \$50 Labor rate 2011-2012: \$55	Current mechanic salary: FICA (.0765): Retirement (.163): Health insurance:
	Labor cost and DOT facility inspection fee for 2010-2011: \$ Parts Procurement Stipend: \$ 25% mark-up for in stock parts: \$ Total labor/facility costs for: \$	labor: \$ cost of facility: \$
ESTIMATED SHARED FINANCIALS/COST	Total cost for one mechanic: Total cost for one bus mechanic's helper: Estimated bus mechanic's helper salary: FICA (.0765): Retirement (.163): Health insurance: Total cost to operate the bus garage: Total cost to provide shared bus maintenance labor and facility: Total number of buses owned by Stamford: 10 full sized buses plus 3 small car/van vehicles Total number of buses owned by Jefferson: 8 full sized buses plus 2 small car/van Total number of full-sized buses combined to be serviced: 18	
	JEFFERSON	STAMFORD
	Number of Jefferson buses divided by total buses to be serviced for both districts times the total cost to provide shared bus maintenance labor and facility: 8/18 (44.4%) x total cost for labor and the facility	Number of Stamford buses divided by total buses to be serviced for both districts times the total cost to provide shared bus maintenance labor and facility: 10/18 (55.6%) x total cost for labor and the facility
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Total Current Cost for labor/facility:	Total Current Cost for labor and the bus garage facility:
	Minus Total Estimated Share to Implement: \$	Minus Total Estimated Share to Implement: \$
	Estimated Net Cost/Savings (+ or -): \$	Estimated Net Cost/Savings (+ or -): \$

SHARING OPPORTUNITY:	Shared Centralized Business Office Functions Through the BOCES; Accounts Payable, Payroll, Health Insurance Accounting
CATEGORY:	Instructional Support
CURRENT METHOD OF DELIVERY:	Stamford purchases central business office services from BOCES that includes: management (state reporting, state aid claims). Also on staff are a civil service business manager who is the treasurer, and a deputy treasurer/clerical support. Jefferson purchases central business office services from BOCES that includes: management (state reporting, state aid claims), payroll, ledger and journal. Also on staff is a Treasurer who is a clerical support person for various business-related tasks. Accounts payable is done within the district.
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	Each district has a treasurer who also is the liaison with the BOCES central business office services. The treasurer is also part of the clerical support for the district. That is, in each district there is a secretary to the superintendent who also serves as a deputy treasurer and part of the internal auditing checks and balances protocol; and there is an appointed treasurer who

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

	<p>is responsible for all data related to employee health insurance, daily communication with the BOCES central business office service, and provides clerical support for district-wide purposes as is needed. It is recommended that both districts also purchase through a municipal agreement (from the local BOCES rfp for such services, for example) an internal auditor service in order to comply with the financial checks and balances requirements of the law.</p> <p>It is suggested that both districts purchase the <i>full range of central business office services</i> from the BOCES. A priority for any district is on-going quality, informed and accurate business practices. The employment market for staff to achieve the expectations of executing quality business services for school districts—especially small school districts—is lean. BOCES also is affected by a scarcity of skilled school business staff. However, the BOCES has a larger team of staff with diverse skill sets who can deliver on needed on-going business related services even in a tight employment market.</p> <p>The current business official at Stamford becomes a BOCES central business office employee as a “senior account clerk” or “principal clerk” or other appropriate title identified mutually by the districts and the BOCES with the guidance of the county civil service office. The services of the staff member is part of the comprehensive business office services provided to both school districts by the Central Business Office Service.</p>
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MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	<p>FOR JEFFERSON and FOR STAMFORD: Putting in place a consistent system to provide the business services expected by law and good practice for all school districts.</p>
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MAJOR CHALLENGES OF SHARING:	<p>FOR JEFFERSON and FOR STAMFORD: Planning together with the BOCES the steps and protocols all will follow.</p>
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STEPS NECESSARY BEFORE IMPLEMENTATION:	<p>FOR JEFFERSON and FOR STAMFORD: Outlining clear job descriptions for the Treasurer and Deputy Treasurer in each district. Outlining a clear list of tasks and timeline for delivery of those tasks and services by the BOCES central business office service. Outlining a clear and comprehensive process to evaluate business services in an ongoing (formative) and summative fashion.</p>
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CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	current salary of treasurer: FICA (.0765): Retirement (.163): Health insurance:	current salary of deputy treasurer: current salary of business manager FICA (.0765): Retirement (.163): Health insurance:
	current contract for business services from BOCES:	current contract for business services from BOCES:
	Total current cost: \$	Total current cost: \$

	JEFFERSON	STAMFORD
ESTIMATED SHARED FINANCIALS/COST:	salary of treasurer: FICA (.0765): Retirement (.163): Health insurance:	Salary of deputy treasurer who becomes treasurer; or a new treasurer: FICA (.0765): Retirement (.163): Health insurance:
	contract cost for internal auditor service (municipal contract):	contract cost for internal auditor service (municipal contract):
	contract cost before BOCES aid for comprehensive business management services from BOCES:	contract cost before BOCES aid for comprehensive business management services from BOCES:
	Total Cost to Implement: \$	Total Cost to Implement: \$

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Total Current Cost:	Total Current Cost:
	Minus Total Estimated Cost to Implement: \$	Minus Total Estimated Cost to Implement: \$
	Estimated Net Cost (+ or -): \$	Estimated Net Cost (+ or -): \$

SHARING OPPORTUNITY:	Shared Educationally Certificated Business Official	
CATEGORY:	Instructional Support	
CURRENT METHOD OF DELIVERY:	<p>Stamford purchases central business office services from BOCES that includes: management (state reporting, state aid claims). Also on staff are a civil service business manager who is the treasurer, and a deputy treasurer/clerical support.</p> <p>Jefferson purchases central business office services from BOCES that includes: management (state reporting, state aid claims), payroll, ledger and journal. Also on staff is a Treasurer who is a clerical support person for various business-related tasks. Accounts payable is done within the district.</p>	
WHAT MIGHT THE SHARING ARRANGEMENT LOOK LIKE?	<p>An educationally certified School Business Official is hired on a shared basis by the two school districts or as a shared itinerant through the BOCES. A shared senior accounts clerk is hired on a shared basis by the two school districts or as a shared service through the BOCES central business office service. This shared senior accounts clerk is responsible for payroll, ledger, journal, and accounts payable of both districts.</p> <p>Each district has a treasurer. The treasurer is also part of the clerical support for the district. That is, in each district there is a secretary to the superintendent who also serves as a deputy treasurer and part of the internal auditing checks and balances protocol; and there is an appointed treasurer who is responsible for all data related to employee health insurance, and provides clerical support for district-wide purposes as is needed. It is recommended that both districts also purchase through a municipal agreement (from the local BOCES rfp for such services, for example) an internal auditor service in order to comply with the financial checks and balances requirements of the law.</p>	
MAJOR OPPORTUNITIES OF SHARING FOR STUDENTS:	<p>FOR JEFFERSON and FOR STAMFORD: Putting in place a consistent system to provide the business services expected by law and good practice for all school districts.</p>	
MAJOR CHALLENGES OF SHARING:	<p>FOR JEFFERSON and FOR STAMFORD: Planning together with the BOCES, if it helps to provide the shared business official and senior accounts clerk, the steps and protocols all will follow.</p>	
STEPS NECESSARY BEFORE IMPLEMENTATION:	<p>FOR JEFFERSON and FOR STAMFORD: Outlining clear job descriptions for the Treasurer and Deputy Treasurer in each district. Searching for a educationally certified business official. Working with the BOCES to see which approach—sharing by the two districts, or sharing by the two districts through the BOCES co-service agreements is most advantageous for the districts.</p>	
CURRENT COST RUBRIC TO PROVIDE THE SERVICE SEPARATELY:	JEFFERSON	STAMFORD
	current salary of treasurer: FICA (.0765): Retirement (.163):	current salary of deputy treasurer: current salary of business manager FICA (.0765):

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

	Health insurance: current contract for business services from BOCES:	Retirement (.163): Health insurance: current contract for business services from BOCES:
	Total current cost: \$	Total current cost: \$
	JEFFERSON	STAMFORD
ESTIMATED SHARED FINANCIALS/COST:	salary of treasurer:	Salary of deputy treasurer who becomes treasurer; or a new treasurer:
	FICA (.0765):	FICA (.0765):
	Retirement (.163):	Retirement (.163):
	Health insurance:	Health insurance:
	contract cost for internal auditor service (municipal contract):	contract cost for internal auditor service (municipal contract):
Sub total indistrict cost:	Sub total indistrict cost:	
	Est. salary of shared certified business official: FICA (.0765): Retirement (.113): Health insurance:	
	Est. salary of shared senior accounts person: FICA (.0765): Retirement (.163): Health insurance:	
	Total Shared Cost: \$ Total cost of each share: 50% x \$ =	
	Total Cost to Implement: \$	Total Cost to Implement: \$
ESTIMATED NET FINANCIALS IF IMPLEMENTED:	JEFFERSON	STAMFORD
	Total Current Cost:	Total Current Cost:
	Minus Total Estimated Cost to Implement: \$	Minus Total Estimated Cost to Implement: \$
	Estimated Net Cost (+ or -): \$	Estimated Net Cost (+ or -): \$

OTHER EXAMPLE SHARING OPPORTUNITIES FOR EXPLORATION (PAGE 68)

SHARING OPPORTUNITY:	Sharing of existing vocal and instrumental music libraries along with equipment between the two schools. Collaborating on future purchases.
Potential financial impact:	Allows existing funds to be used to provide more resources without duplication of what now both districts own.
SHARING OPPORTUNITY:	There are 3.5 music teachers combined in both districts. Both districts value vocal and instrumental music. Provide a combined 7-12 band. Provide a combined drama production and/or combined musical production.
Potential financial impact:	Allows <i>existing funds</i> to be used to provide expanded student opportunities without duplication. If only one combined drama/musical production was decided to be offered, then the <i>existing budgeted resources</i> for two separate productions are available to use for other music program opportunities.
SHARING OPPORTUNITY:	Sharing of specialty library collections (example: dinosaurs; forensic science; nano-technology resources)—schedule and transport collections between schools.
Potential financial impact:	Allows existing funds to be used to provide more resources without duplication of what now both districts own or will purchase.

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

SHARING OPPORTUNITY:	Communicate and collaborate whenever pupils are transported for field trips and special events.
Potential financial impact:	Both school districts attend similar co-curricular functions each year. For example the All-State music festival is in November and the All-County NYSSMA festival is in the Spring. Communication and coordination to transport the participating pupils from both schools for such activities can save both districts up to half of the current expenditure.
SHARING OPPORTUNITY:	Continue participation in the BOCES region cooperative bidding service and bid together all other items not on the regional bid.
Potential financial impact:	From time-to-time there may be items not available on the regional bid. Both districts can bid and/or quote such items in concert for the best pricing.
SHARING OPPORTUNITY:	Stamford currently purchased gasoline from a local gas station. A sharing opportunity exists to collaborate with village or town governments to jointly bid gasoline; use the village/town pumping facilities:
Potential financial impact:	Larger volume of fuel commodity for bidding allowing potential savings for the school districts and the local governments. (reference: Stockbridge Valley Central School District of Munnsville, NY executes such a sharing arrangement with its main town government.)
SHARING OPPORTUNITY:	With the help of the local BOCES consortium and other regional BOCES in this part of the state and municipalities, explore high volume bidding of electricity as a consortium through a municipal sharing agreement.
Potential financial impact:	The Onondaga-Cortland-Madison BOCES currently facilitates a consortium of over 400 school districts and local governments in bidding electricity and natural gas. Savings range from 10 to 25% for participating entities.

EPILOGUE (PAGE 69)

The school staff and other stakeholders along with the community members who took part in the focus group meetings, all expressed their heartfelt pride and support of their school districts and their school district communities. There also was a deep commitment to ensuring that all pupils have a safe and nurturing learning environment that will enable them to be globally competitive.

All participants were acutely aware of the local, statewide, and national economic characteristics that will not necessarily allow state government to provide sufficient state funds to operate public schools. Hence, the main purpose of the study engaged by both boards was to identify ways that the districts could save dollars and/or provide more for students with the dollars already available.

New York State Property Tax Cap

During the 2010-11 session, the New York State Legislature and Governor Cuomo enacted a Property Tax Cap. This new cap limits increases in annual school district property tax levies (not the tax rate) to two percent (2%) or the rate of inflation (CPI) whichever is less. Local communities can override the tax limit with a 60 percent vote. The law will first affect the 2012-13 tax levies.

The full impact of the newly enacted Tax Cap may not be known until the budget development process is completed for the 2012-13 school district budgets. Any long-range financial planning (including expenditures, revenues and fund balance) will certainly be impacted. As the study goes to press, school officials are still learning about the complexities of calculating what the tax cap is for each school district. The new legislation is a major change to the NYS culture of local taxpayer decision-making about the local school district budget. It is encouraged that the boards of education and district leadership have an ongoing dialogue with the community about the new law and how it may affect the educational programs of the respective schools.

For more information on the Property Tax Cap and the impact it might have on low wealth and rural school districts, see <http://www.nyruralschools.org/downloads/taxcap.pdf>

The Boards of Education expressed no pre-conceived, 'pre-decided' methods for possible sharing between Stamford and Jefferson. They did not engage the study team just to reinforce ideas or 'decisions' already defined by them. The goal of the

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

study was to examine and identify functional sharing opportunities in an open and transparent manner up “to a potential school district reorganization”.

Hopefully, implemented sharing options identified by the study combined with the state dollars that are allocated to the districts for operating, along with property taxes at an acceptable level determined by each community will enable the school districts to achieve what the communities expect for their public schools and their students.

What follows is a brief discussion of the financial picture of school district reorganization if the Jefferson and Stamford school districts decided that implemented sharing strategies and options fell short of the balance of what the communities envision for the education program and the available local tax resources. The information is provided in the study not to advocate that the districts pursue reorganization. It is hoped that the districts will choose sharing options identified by the study that fit their culture together and their shared vision of what they want for their students. The reorganization financial snapshot that follows is provided at the request of the Boards who wanted to ensure that their communities have first hand information about what are the financial elements of reorganization to help as a benchmark for the current efforts to explore and implement appropriate program and functional sharing opportunities together by Jefferson and Stamford. The data presented can help the districts initially examine and have a forecast of the financial elements if the districts were to form a consolidated school district in the future.

REORGANIZATION INCENTIVE AID

In New York State, when two or more school districts reorganize, the new district receives two forms of state aid not available to the predecessor districts. They are Reorganization Incentive Operating Aid and Reorganization Incentive Building Aid.

**REORGANIZATION INCENTIVE OPERATING AID
(Section 3602(14)(d) and (d-1) of Education Law)**

For school districts that merge after July 1, 2007, Incentive Operating Aid is available for 14 years starting with the first year of operation as a reorganized district.

For five years after reorganization, aid payable is equal to the sum of 40% of 2006-07 formula operating aid for each of the predecessor districts, based upon the data file that was created for the February 15, 2007 State Aid Database Gen Report.

Incentive Operating Aid for the first five years as a reorganized district =

.40 X (2006-07 Formula Operating Aid)

2006-07 Formula Operating Aid =
(2006-07 Selected Operating Aid per Pupil X Total Aidable Pupil Units or TAPU)

After receiving Reorganization Incentive Operating Aid for five years, the additional 40% apportionment will be reduced by 4 percentage points each year until the apportionment reaches zero in the 15th year of reorganization. The sum of Selected Operating Aid per pupil multiplied by TAPU plus Incentive Operating Aid may not exceed 95% of the district's Approved Operating Expenses (line 74) used for aid calculations in the current school year.

**ESTIMATING REORGANIZATION INCENTIVE OPERATING AID
FOR A MERGED DISTRICT**

An initial estimate of Reorganization Incentive Operating Aid payable may be calculated by retrieving the most current General Aid Output Reports (GEN), for districts considering a reorganization, from the NYS Education Department State Aid website at <https://stateaid.nysed.gov/>. Section VII of the GEN, which is partially completed for all districts, specifies the Reorganization Incentive Operating Aid calculation (line 73). The line 73 incentive aid figure is set by law and can only be changed by a change in the law. Reorganization Incentive Operating Aid potentially payable to each district expected to be part of a merger, should be added together to determine an estimate of the total incentive operating aid payable to a presumed successor merged or reorganized district for a period of five years. Thereafter, the incentive operating percent on line 76 will decrease by .04 annually until it reaches zero in year 15.

**REORGANIZATION INCENTIVE BUILDING AID
(Section 3602(14) of Education Law)**

Incentive Building Aid is 30 percent of the Building Aid otherwise paid on an approved building project. Aid is paid on eligible projects (those initiated after reorganization) for which the general construction contract is signed prior to July 1, 2010 or within ten years of the effective date of the reorganization, whichever is later. In no case, however, may the sum of regular Building Aid

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

(including the 10% incentive) and Reorganization Incentive Building Aid exceed 95% of approved building expenditures, or 98% for high need school districts. For high need districts, the 98% also includes the impact of the High Need Supplemental Building Aid Ratio adjustment.

The highest Selected Building Aid Ratio of the Jefferson and Stamford Central School Districts is Stamford's at .763. Therefore, the Reorganization Incentive Building Aid Ratio for new SED-approved construction, renovations, and the like, for the reorganized district would be the maximum of 95% for ten years following the date of the reorganization.

Any old debt carried forward from the two former districts to the new district would not be aided at 95%, but all would be aided at the highest Selected Building Aid Ratio of the two former districts. In this case and at this time, it would be Stamford's at .763.

REORGANIZATION INCENTIVE OPERATING AID

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

Jefferson	\$862,146
Stamford	\$1,856,442

Total base \$2,718,588

If Reorganization occurred first year:	2012-2013
Therefore, last of 14 years of incentive aid:	2025-2026

MERGER YEAR	TOTAL BASE AID	INCENTIVE AID %	EST. INCENTIVE	
1	\$2,718,588	40%	\$1,087,435	
2	\$2,718,588	40%	\$1,087,435	
3	\$2,718,588	40%	\$1,087,435	
4	\$2,718,588	40%	\$1,087,435	
5	\$2,718,588	40%	\$1,087,435	
				Total est. first five years:
6	\$2,718,588	36%	\$978,692	
7	\$2,718,588	32%	\$869,948	
8	\$2,718,588	28%	\$761,205	
9	\$2,718,588	24%	\$652,461	
10	\$2,718,588	20%	\$543,718	
11	\$2,718,588	16%	\$434,974	
12	\$2,718,588	12%	\$326,231	
13	\$2,718,588	8%	\$217,487	
14	\$2,718,588	4%	\$108,744	
				Total est. incentive aid
2026-2027		0%	\$0	over 14 years: \$10,330,634

SUMMARY OF POTENTIAL SAVINGS AND COSTS OF THE OPTIONS FOR SHARING BASED ON EXPENDITURES OF EACH INDIVIDUAL DISTRICT IN 2011-2012 (PAGE 129)

Charted below are the various sharing options identified by the study as viable mutual opportunities for Jefferson and Stamford as both districts analyze the benefits of formal collaborations on their futures as public school districts.

It is unlikely that all the options will be implemented as suggested. It is also unlikely that all the options will be implemented simultaneously. In order to quantify the potential savings for each of the sharing options, the costs of providing the program and services separately are listed below next to the estimated cost for providing the program and services collaboratively. The dollar amounts are benchmarked to 2011-2012 costs or to 2010-2011 costs, whichever is most appropriate. It is important that as part of the process of implementing an option is the costing out of the option using the most current financial information. For example, in 2012-2013 notice has already been received by the school districts that the teachers' retirement contribution by school districts will be rising by over 2%.

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

SHARING OPTION:	CURRENT COST FOR JEFFERSON	CURRENT COST FOR STAMFORD	ESTIMATED SHARED COST FOR JEFFERSON	ESTIMATED SHARED COST FOR STAMFORD	ESTIMATED SAVINGS/COST FOR JEFFERSON	ESTIMATED SAVINGS/COST FOR STAMFORD
Library Media Specialist--page 35						
Scenario I	\$33,402	\$59,362	\$46,382	\$46,382	+\$12,980	-\$12,980
Scenario II	\$33,402	\$59,362	\$29,681	\$29,681	-\$3721	-\$29,681
Low Participation Interscholastic Athletics—EXAMPLE; MODIFIED BASEBALL--page 37	\$4039	\$4110	\$2173.50	\$2145	Example -\$1865.50	Example -\$1695
Distance Learning—page 38	\$0	\$62,533	\$626 per shared percent	\$626 per shared percent	Example +\$626 per shared percent used by Jefferson	Example -\$626 per shared percent used by Jefferson
Itinerant Science Teacher—page 39	\$54,861	\$16,586	\$50,818	\$30,490	-\$4043	+\$13,904
Advanced Art Course(s)—page 41	\$0	\$16,085	Example: 3 students; \$8043	Example 3 students: \$8043	example +\$8043	example -\$8043
Advanced Placement Courses—page 42			\$500 to \$850 a pupil	\$500 to \$850 a pupil	:revenue/cost neutral; or :a cost of \$500 to \$850 per pupil if more Jefferson pupils enrolled than Stamford pupils; or :a savings of \$500 to \$850 per pupil if fewer Jefferson pupils enrolled than Stamford pupils.	:revenue/cost neutral; or :a cost of \$500 to \$850 per pupil if more Stamford pupils enrolled than Jefferson pupils; or :a savings of \$500 to \$850 per pupil if fewer Stamford pupils enrolled than Jefferson pupils.
Pre-K through 6 at Jefferson; 7-12 at Stamford—page 44	Estimated total savings of \$761,832 to \$871,832. Individual district share of savings depends upon number of pupils enrolled at each level by each partner district.					
CSE Chairperson/Supervisor—page 53	\$48,700	\$39,512	\$37,538	\$37,538	-\$11,162	-\$1974
Superintendent of Schools—page 54	\$141,223	\$148,654	\$93,235	\$93,235	-\$47,988	-\$55,419
Cafeteria Management—page 57	\$49,692	\$47,552	\$26,343	\$26,343	-\$23,349	-\$21,209
Transportation Supervisor—page 59	\$48,093	\$41,039	\$26,343	\$26,343	-\$21,750	-\$14,696
Supervisor of Building and Grounds—page 60						
With no additional new investment in caretaking resources for the facilities:	\$65,580	\$81,153	\$38,738	\$38,738	-\$26,842	-\$42,415
With additional new investment in caretaking resources for the facilities:	\$65,580	\$81,153	\$56,238	\$56,238	-\$9342	-\$24,915

JEFFERSON-STAMFORD SHARING STUDY SYNOPSIS

SHARING OPTION:	CURRENT COST FOR JEFFERSON	CURRENT COST FOR STAMFORD	ESTIMATED SHARED COST FOR JEFFERSON	ESTIMATED SHARED COST FOR STAMFORD	ESTIMATED SAVINGS/COST FOR JEFFERSON	ESTIMATED SAVINGS/COST FOR STAMFORD	
Bus Garage and Vehicle Maintenance—page 62	\$67,816	\$95,229	\$66,070	\$104,642-\$9413 = \$95,229	-\$1746	\$0	
Centralized Business Office Functions—page 64	\$133,599	\$147,288	\$147,702	\$143,942	+14,103 not counting BOCES Aid on the service purchase	-\$3346 not counting BOCES Aid on the service purchase	
Shared Educationally Certified Business Official and shared senior accounts clerk—page 66	\$133,599	\$147,288	\$147,865	\$137,475	+\$14,266 not counting BOCES Aid on the service purchase	-\$9813 not counting BOCES Aid on the service purchase	
Other examples:--page 68							
Vocal and instrumental music libraries						Can increase the library for both school districts without adding funds to acquire new additions.	
Combined drama and or musical production opportunities.						Increased student opportunity using existing resources.	
Specialty library collections						Can increase the library for both school districts without adding funds to acquire new additions.	
Combined Field Trips						At least 50% the cost of transporting as a single district.	
Bid items together that are not on the regional bid						Estimated 20 to 35% savings.	
Multi BOCES Regional bid for electricity						Estimated 10 to 15% savings over current rates.	
						Est. Savings for Stamford	
Bid and Purchase gasoline with the village/town; use existing municipality tank and pumps.						10 to 25% of current gasoline cost	
Implementing elementary instruction with multi-age classrooms						Estimated \$110,000	