

Reorganization Feasibility
Study
On Behalf of the



Madison and
Stockbridge Valley



Central School Districts
February, 2013

FINDINGS OF THE STUDY

Prepared by:
The SES Study Team, LLC

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Department of State under the local government efficiency grant program.*

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

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

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

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Brayman, Duane	Parent	Support Services
Clark, Jessica	Parent/MCS Staff	Support Services
Cotter, Michele	Faculty	Student Program
Dapson, Samantha	Support Staff	Finance
Davis, Kimberly	Parent	Student Program
Jeffers, Ed	Parent	Finance
LaForce, Eileen	Parent	Support Services
Masker, Dianne	Parent	Finance
Mitchell, Lisa	Parent	Student Program
Nichols, Annett	Parent	Finance
Smith, Doug	Parent	Support Services
Snyder, Jona	Parent	Student Program
Snyder, Kelly	Parent	Student Program
Stolarczyk, Paula	Parent	Finance
<i>COMMUNITY ADVISORY COMMITTEE FOR STOCKBRIDGE VALLEY CENTRAL SCHOOL DISTRICT</i>		
Bartlett, Shelia	Faculty Rep	Program
Chapin, Jennie	Real Estate Agent	Finance
Church, Malary	Unmarried <30	Program
Conklin, Bernard	Retired	Support Services
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DeMenezes, Ed	Pre-school Parent	Finance
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Marshall, Fred	Support Staff Rep	Support Services
McInerney, John	Empty Nester	Finance
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Pokorny, Jay	HS Parent	Support Services
Reed, Norm	Elected Leader	Finance
Shea, William	Business Person	Finance
Usborne, Justiss	Student	Program

The Boards of Education, the Superintendents, and the SES Study Team sincerely thank the volunteer Joint Community Advisory Committee Members for their time, diligence, collaboration and advice in the preparation of this study.

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

Preface

Madison Central School District

Board of Education Members: Kathy Bridge; William Langbein; Carl Lindberg; James Mitchell (president); Jona Snyder; Stephanie Tanner; Steve Yancey

Superintendent of Schools: Perry Dewey

The Madison Central School District is located on Route 20 in the heart of rural Madison County. The district, while considered a small, rural district in size of approximately 50 square miles, provides individualized attention for all students, with a focus on preparing them for academic excellence and lifelong learning.

Madison has one building which houses approximately 460 students in grades Pre K-12. The community residents possess a strong belief in education and support the District in positive educational endeavors.

The community that supports the District is rural in character comprised of agricultural farms and small businesses. The school places high standards of student achievement and offers a well-rounded variety of instructional programs for students.

Madison is a component district of the Madison-Oneida BOCES located in Verona. Madison students participate in a variety of programs including career and technical education, preschool and special education programs. The District is managed by two district level administrators; two building level administrators and three support supervisors. The operating budget for the 2012-13 school year was approximately \$8.8 million.

Stockbridge Valley Central School District

Board of Education Members: Jacob Byron (president); Christina Chapin; Lindsey Cross; Thomas Jones; Michael Oot; Barbary Reaves; Charles Wilson Jr.

Superintendent of Schools: Dr. Patrick Curtin, Interim

The Stockbridge Valley Central School District is located in the eastern portion of Madison and the western perimeter of Oneida County. It is approximately 20 miles from the cities of Syracuse, Utica and Rome. Interstate 90 is in close proximity as well as state highways 5 and 46.

The school district is approximately 42 square miles and is primarily residential and agricultural in character. Many of the residents are employed either in, or close to Syracuse, Utica, Rome and Oneida. Commercial and professional services are afforded the residents within the district. Several small family farms are in the district. Industry continues to remain stable within the District.

Today the Stockbridge Valley Central School District has approximately 490 Pre K-12 students who are all housed at the building in Munnsville.

Stockbridge Valley is also a component district of the Madison-Oneida BOCES and its students also participate in a number of BOCES programs. The District is managed by two district level administrators, two building administrators and two support supervisors. The operating budget for the 2012-13 school year was \$10.0 million.

INTRODUCTION

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

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

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

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

THE DILEMMA FACING COMMUNITIES AND THEIR RESPECTIVE BOARDS OF EDUCATION

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

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

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

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

DUE DILIGENT PLANNING BY THE MADISON AND STOCKBRIDGE VALLEY BOARDS OF EDUCATION AND THIS STUDY

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

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

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

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

We hope our work in collaboration with 30 volunteer community members from the two school districts is a valuable tool to help local decision-making. The study is just one source of information to help community discussion about how 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 public education.

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

The SES Study Team, LLC
February, 2013

Please note:

If the communities choose to approve a reorganization of both districts into one, the reorganization would begin on July 1, 2014—a complete school year from the current school year. Since staffing and financial data do not exist for the school year 2013-2014 at the time of the study, all staffing and financial data used in the study are benchmarked to the school year 2012-2013. Therefore, estimated numbers in the study may change once 2013-2014 staffing and finance data are established by Madison and Stockbridge Valley Central School Districts.

TABLE OF CONTENTS

<i>Preface</i>	<i>i</i>
<i>Introduction</i>	<i>ii</i>
Purpose of the Study	1
Methodology of the Study	1

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

A. Demographics of the Two School Districts

1. Estimated Enrollment Projections of the Two School Districts	3
2. Federal Census Demographic Data Snapshot of the Two School Districts	6
3. Geographic Distances Between the School Buildings of the Two Districts	7
4. Fiscal Condition Profiles of Each School District	8
5. Historical Perspective of Referendum Votes of Each District	13

B. The School Buildings in the Two School Districts

1. Pupil Capacity of Each of the School Buildings	13
2. Infrastructure Condition of the Existing School Buildings	15

C. The Educational Program Currently in the Two School Districts

1. Current Class Sizes Grades pre-K through Grade 12	18
2. The Elementary Program Offerings	20
3. The Secondary Program Offerings	22
4. Interscholastic Athletics/Co-curricular/Music/Drama Offerings	24
5. State Student Assessment Data and High School Graduation Data	28
6. Regional Sharing with Other School Districts	33

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

D. Building Use Options Identified by the Joint Community Advisory Committee	34
E. School Day Time Schedule and Pupil Transportation	36

CURRENT PERSONNEL DATA AS REVIEWED BY THE JOINT COMMUNITY ADVISORY COMMITTEE

F. Profile of the Major Elements of Labor Contracts in Place in the Two Districts	37
G. Average Total Full Time Equivalent Personnel Expenditures Across the Two School Districts Benchmarked to the 2011-2012 School Year	42
H. Full Time Equivalents of Staff Who Have Left the Districts for All Reasons Except Reduction in Force for the School Years 2007-2008 Through 2010-2011	43

WHAT MIGHT A ‘REORGANIZATION’ ROADMAP LOOK LIKE?

Where would the students go to school?

I. Suggested Prime Building Use Plan to Implement the Pre-K through 12 Program if the School Districts Reorganized into One	44
--	----

What might the program for students look like?

J. Suggested Breadth of Student Program Elements if Reorganization of the Two School Districts into One is Approved by the Communities	46
---	----

What staff would the reorganized school district probably need?

K. <i>What if Picture</i> of the Staff Necessary to Deliver the Program in a Reorganized District	53
--	----

What might be the plan for bus transportation?

L. Example School Day Time Schedule and Pupil Transportation if the Prime Building Use Option is Implemented to Serve the Pupils in a Reorganized District	54
--	----

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

M. <i>What if Picture</i> of the Estimated Long Term Budget Financials if the Two Districts Reorganize into One District	57
---	----

What is expected to happen to property taxes?

N. <i>What if Picture</i> of the Estimated Property Taxes in the First Base Year on a \$100,000 Home in Each of the Towns Served by the Reorganized School District	67
---	----

Summary Estimated Impact on Property Taxes if a Reorganization is Approved	
Summary Estimated Additional Instructional Opportunities for all Students if a Reorganization is Approved	67

**What would the new school district need to do to prepare for the school year in
‘September’ 2014?**

O. Outline of Major Transition Steps to Create One School District if the Communities Approve the Reorganization Referendum	68
P. Feasibility Study Question Summary	71

DATA SETS OF THE STUDY ARE COMPILED AS A SEPARATE DOCUMENT IN ADDITION TO THE *FINDINGS OF THE STUDY* AND IS AVAILABLE IN PRINT AND ON THE WEBSITES OF THE DISTRICTS

Data Reference Tools Compiled by the Study, Analyzed by the Joint Community Advisory Committee, and Posted on the Website of Each School District as the Study Progressed since March 2012

(Page numbers refer to the page numbers in the separate Data Sets Document compiled for the study.)

Criteria Used by the Boards of Education to Appoint Community Advisory Committee Members	-1-
<i>What Questions Should the Joint Community Advisory Committee and the Two District Reorganization Study Address/Answer?</i>	-2-
Agendas of the Work Session Meetings of the Joint Community Advisory Committee	-5-
Pupil Enrollment Projection Calculations	-24-
Federal Census Bureau Demographic Characteristic Estimates for the Two School Districts	-52-
School District Financial Characteristics/Fiscal Condition Profiles	-64-
2011-2012 Grade Level Section Class Sizes	-75-
Pupil Capacity of Each School Building for Possible Use in a Reorganized School District	-79-
Summary Results of the 2010 Building Condition Surveys	-89-
Elements of the Grade Pre-Kindergarten through Grade 6 Program in 2011-2012	-93-
Elements of the Grade 7 through Grade 12 Program in 2011-2012	-96-
2011-2012 Program Elements: Interscholastic Athletics, Co-Curricular and Music/Drama	-101-
2010-2011 Summary of Elementary and High School Assessment Results	-107-
National Clearinghouse Data About College Attendance, Persistence, and Attainment	-116-
Labor Contract Profiles and Full Time Equivalent Cost Data	-128-
Some Possible ‘What If’ Ideas to Use the Existing School Buildings if the Communities Chose to Reorganize the Two Districts into One	-150-
A ‘What if’ Picture of a Pupil Transportation Plan	-164-

APPENDIX

<i>“Questions and Answers”</i> to Commonly Asked Questions about Timeline and Governance Topics Related to School District Reorganization	-169-
<i>School District Reorganization Incentive Aid</i>	-171-
<i>Q and A</i> about the Process with Regard to Personnel when a School District Reorganization Occurs through Centralization	-172-

FINDINGS OF THE STUDY

PURPOSE OF THE STUDY

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

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

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

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

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

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

METHODOLOGY OF THE STUDY

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

FINDINGS OF THE STUDY

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

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

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

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

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

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

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

- ◇ Demographics of the two districts.
- ◇ The current ‘fiscal condition profiles’ of each district.
- ◇ Current property taxes.
- ◇ Pupil capacities of the existing school buildings.
- ◇ Building conditions of the existing school buildings.

FINDINGS OF THE STUDY

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

The agendas for each of the work session meetings of the Joint Community Advisory Committee are included starting on page -5- of the **DATA** section of the study report

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

A. Demographics of the Two School Districts

1. **Estimated Enrollment Projections of the two school districts.**

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

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

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

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

FINDINGS OF THE STUDY

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

The enrollment projections calculation study data tool is in the **DATA** section of the study report starting on page -24-.

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

<i>DATA SNAPSHOT MADISON CS</i>			
Calculation	Year	Grades K-6	Grades 7-12
CURRENT ENROLLMENT	2011-2012	255	211
Baseline Cohort Low Range	2013-2014	254	222
	2016-2017	234	218
Baseline Cohort Mid Range	2013-2014	250	222
	2016-2017	243	218
Baseline Cohort High Range	2013-2014	270	222
	2016-2017	291	218

<i>DATA SNAPSHOT STOCKBRIDGE VALLEY CS</i>			
Calculation	Year	Grades K-6	Grades 7-12
CURRENT ENROLLMENT	2011-2012	236	256
Baseline Cohort Low Range	2013-2014	227	228
	2016-2017	222	199
Baseline Cohort Mid Range	2013-2014	230	228
	2016-2017	252	199
Baseline Cohort High Range	2013-2014	234	228
	2016-2017	263	199

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

FINDINGS OF THE STUDY

<i>DATA SNAPSHOT</i>				
Calculation	Year	Grades K-6	Grades 7-12	TOTAL GRADES K-12 FOR INITIAL IMPLEMENTATION PLANNING
CURRENT COMBINED ENROLLMENT OF THE TWO DISTRICTS	2011-2012	491	467	958
Baseline Cohort Low Range	2012-2013	480	470	950
	2013-2014	482	450	932
	2014-2015	463	449	912
	2015-2016	459	425	884
	2016-2017	456	417	873
Baseline Cohort Mid Range	2012-2013	480	470	950
	2013-2014	481	450	931
	2014-2015	483	449	932
	2015-2016	484	425	909
	2016-2017	495	417	912
Baseline Cohort High Range	2012-2013	492	470	962
	2013-2014	505	450	954
	2014-2015	513	449	962
	2015-2016	529	425	954
	2016-2017	554	417	970

FINDINGS:

Madison: Elementary grades K-6 enrollment is estimated to decrease between 10 and 12 pupils over the next five years. Grades 7-12 enrollment is estimated to increase by about 11 pupils over the next five years.

Stockbridge Valley: Elementary grades K-6 enrollment is estimated to decrease by about 6 pupils over the next five years. Grades 7-12 enrollment is estimated to decrease by about 28 pupils over the next five years.

If the communities authorized a reorganization of the two districts into one, the earliest the new district could begin operation is on July 1, 2014. It is expected that the K-6 enrollment of a reorganized district will be between 463 and 513 pupils in 2014-2015. The new district can expect a grades 7-12 enrollment in 2014-2015 of reorganization will be about 449 pupils.

The most conservative enrollment projection estimates a total of 912 pupils in grades K-12 for a reorganized district in year one of operation in 2014-2015. A mid-range projection estimates a total of 932 pupils and the high-range projection estimates a total of 962 pupils for grades K-12. In 2011-2012, the two districts combined serve 958 pupils in grades K-12.

The study uses the *high range* projection estimates for 2016-2017, five years from the 2011-2012 school year, in its analyses. The enrollment projection of 970 pupils in grades K-12 (554 pupils in grades K-6 and 417 pupils in grades 7-12) is used as a baseline in reviewing program opportunities, staffing, and use of facilities to deliver a ‘*what if*’ program if the two districts reorganized into one.

FINDINGS OF THE STUDY

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

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

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

A valuable tool to use as the Boards and communities make value judgments about future enrollments and the outlook for the Madison and Stockbridge Valley school districts is Federal Census data. Below is a chart that lists some of the most salient demographic characteristics reported by the American Community Survey estimate for the five year period 2006-2010. Discussing the similarities and dissimilarities of the characteristics of the two school districts can be valuable as the Boards, senior leadership, and the communities define short range and long-range plans for the districts. The Census data are meant to engage discussion about how to serve the pupils and the communities of the school districts. 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.

The **DATA** section of the study report starting on page -52- includes a comprehensive list of demographic characteristics of each school district in two categories: *Demographic and Housing Estimates, Social Characteristics, Economic Characteristics, and Housing Characteristics.*

An example discussion question for Madison and Stockbridge Valley based on the Census data might include:

- ✓ What challenges and/or opportunities do the following demographic characteristics present to the mission of providing public education in the two districts reorganized into one; or separately as two distinct districts?
 - 6.6% of the Madison school district population is under five years old; 10.1% for the Stockbridge Valley school district; What might encourage new population with pre-schoolers or school age children to move to the area?
 - the median age of the Madison school district is 44.2 years; 37.6 for Stockbridge Valley; Typically 20 to 44 is considered to be prime ‘childbearing years’. What might encourage new population in the 20 to 44 year age group to move to the area?
 - 17.3% of the Madison school district households include one or more people over 65; 12.2% for Stockbridge Valley; 26% of the Madison school district households include one or more people under 18; 36.7% for Stockbridge Valley;

FINDINGS OF THE STUDY

- 94.1% of the population in the Madison school district were in the same residence one year ago; 88.7% of the population in the Stockbridge Valley school district were in the same residence one year ago.
- 86.1% of the Madison population has a high school diploma or higher; 86.7% of the Stockbridge Valley school district population;
- average household income in the Madison district is \$55,377; \$53,530 in the Stockbridge Valley district;
- average family household income in the Madison district is \$67,797; \$57,529 in the Stockbridge Valley district;
- 8.1% of all the family households in Madison are below the poverty level; 11% in Stockbridge Valley;
- 11.3% of the total population of Madison are below the poverty level; 16.4% in Stockbridge Valley;
- 14.5% of all people under 18 in Madison are below the poverty level; 28.7% in Stockbridge Valley;
- 8.6% of all people 65 years and older in Madison are below the poverty level; 13.9% in Stockbridge Valley;
- 83% of the housing units in Madison are owner-occupied; 80.1% in Stockbridge Valley.

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

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

Possible Opportunities:	Possible Challenges:
◇ Despite the two districts represent two district “communities”, the demographics are similar.	◇ Overcoming community resistance to giving up unique sense of each school district.
◇ Given that the demographics are very similar it is possible a merger would be cohesive.	◇ The median age of the Madison population is just outside the range considered ‘child-bearing’ years. The median age of the population of Stockbridge Valley is in the upper thirties range. Without new population moving in at a ‘family-building age’, what happens to the number of school-aged population in the school districts?
◇ The two school districts are supporting very similar students.	

3. Geographic Distances between the School Buildings of the Two School Districts

✓ **Sizes of School Districts in the Madison-Oneida BOCES in square miles:**

Oneida	Stockbridge Valley	Madison	Hamilton	Canastota	Morrisville-Eaton	Reorganized district of Madison and Stockbridge	VVS	Rome	Camden
36.06	42.50	50.22	55.31	56.41	76.89	92.72	95.19	99.07	303.38

FINDINGS OF THE STUDY

- ✓ **Potential size of reorganized district made up of Madison and Stockbridge: 92.72 square miles.**
- ✓ **Distance between the school district campus in Munnsville and in Madison: 10.43 miles**

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

Possible Opportunities:	Possible Challenges:
◇ Serving as many grade levels in one location probably could provide better programs at a lower cost.	◇ The main campuses of the districts are about 10 miles apart.
	◇ Younger children (probably grades K through 4) should be bused the least. Possibly maintain local elementary schools in the overall plan.
	◇ Try and keep bus routes to no longer than the time length currently.

4. Fiscal Condition Profiles of the Two Districts

Each district is required to file an external audit report annually with the NYS Comptroller. Such reports include observations about the finances as well as the practices that the school district employs to securely manage funds. The annual external audit reports are public documents available from each respective district. The external auditor for each school district expressed “an unqualified opinion” on the 2011-2012 fiscal year financial statements for each district. Both auditors concluded that “no significant deficiencies were noted during the audit of the financial statements” for 2011-2012.

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

Some indicators of fiscal health include such items as:

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

The **DATA** section of the study report starting on page -64- includes an analysis of expenditures, revenues, fund balances, and long term debt of the two districts for the fiscal year ending June 30, 2012.

FINDINGS OF THE STUDY

Charted below are the unreserved/unallocated fund balance percentages of the annual approved budgets for the fiscal year ending June 30, 2012. The fund balance at Madison is over the 4% threshold.

Unreserved/Unallocated Fund Balance as a % of the Annual Approved Subsequent Year Budget (2012-2013)		
	Madison	Stockbridge Valley
June 30, 2012	7.4%	3.78%

Below is a fiscal condition summary comparison of the two districts based on the 2011-2012 fiscal year.

FINANCIAL CONDITION COMPARISON AS OF JUNE 30, 2012

	INDICATORS	SCHOOL DISTRICT		OBSERVATIONS
		Madison	Stockbridge Valley	
1	General Fund Excess Revenues Over Expenditures Last Two Years?	2011 - No 2012 - Yes	2011 - No 2012 - Yes	Both districts had excess expenditures in 2011 which came out of fund balance (\$46,530 for Madison, \$26,449 for Stockbridge).
2	State and Federal Aid / Total Revenue	62.70%	73.37%	Stockbridge more dependent on State Aid as a revenue.
3	K-12 Public School Enrollment including Charter Schools	446	489	These enrollment numbers are from 2010-2011.
4	General Fund Expenditures per Pupil	\$18,351	\$18,513	Amounts consistent.
5	Debt Service as a % of Expenditures	11.92%	16.14%	Stockbridge debt service is higher due to new building construction and more renovations. However, Stockbridge fixed assets net of depreciation are also higher.
6	Percent of Unexpended 2012 Budget	8.3%	7.3%	
7	Percent of Revenue Under Budget	-2.9%		
8	2012 Excess (Deficit) Revenues and Expenditures to Budget	5.5%	7.3%	
9	% of Pupils Eligible for Free/Reduced Price Lunches	46.0%	45.4%	The numbers used to derive these percentages were taken from 2010-2011.
10	School Lunch Fund Balance at June 30, 2012	\$25,573	\$94,507	Madison had a net loss in 2012 of \$8,554.
11	School Lunch Subsidy from General Fund?	No	No	
12	Other Post-Employment Benefits	\$588,893	\$341,086	Health insurance for premiums retirees.
13	Total Medical Insurance expense.	\$1,394,201	\$1,304,194	Amounts include retiree premiums.

FINDINGS OF THE STUDY

EXPENDITURES FOR THE YEAR ENDED JUNE 30, 2012

	Financial Characteristic/ Element	Madison	Stockbridge Valley	Observation/Items to note or consider:
1	Expenditures (2012):			
2	Total	8,184,732	9,053,058	Both district expenditures were lower in 2012 from 2011 (3.1% and 4.1%, respectively).
3	General Support	1,043,400	1,154,155	
4	% General Support of Total	12.75	12.75	
5	Instruction	3,482,593	3,924,938	
6	% Instruction of Total	42.55	43.35	
7	Employee Benefits	2,058,403	1,945,498	
8	% Employee Benefits of Total	25.15	21.49	
9	Sub-total General Support, Instruction, and Employee Benefits	6,584,396	7,024,591	
10	% Total General Support, Instruction, and Employee Benefits of Total	80.45	77.59	
11	Transportation	624,835	566,950	Madison includes \$194,066 in bus purchases. Without buses transportation is \$430,769.
12	% Transportation of Total	7.63	6.26	Madison percentage is 5.2 without bus purchases.
13	Debt Service	975,501	1,461,517	Includes \$472,708 in construction BAN redeemed from appropriations. Serial bond issued for \$4,923,699.
14	% Debt Service of Total	11.92	16.14	Subsequent years debt service for Stockbridge will be approximately \$1,250,000, or 13.8% of 2012 expenditures.

REVENUES FOR THE YEAR ENDED JUNE 30, 2012

	Financial Characteristic/ Element	Madison	Stockbridge Valley	Observation/Items to note or consider:
1	Revenues (2012):			
2	Total	8,307,863	9,120,385	
3	Real Property Taxes and Tax Items (including STAR)	2,929,492	2,156,858	Madison includes \$78,691 in windpower payments, Stockbridge \$30,859.
4	% Real Property Taxes of Total	35.26	23.65	Madison is more dependent on Real Property Taxes.
5	State Aid	5,208,510	6,654,239	
6	% State Aid of Total	62.69	72.96	
7	Federal Aid	482	37,110	Medicaid assistance.
8	% Federal Aid of Total	0.01	0.41	
9	Charges for Services	51,872	30,718	
10	% Service Charges of Total	0.62	0.34	
11	Miscellaneous & Others	117,507	241,460	Stockbridge includes \$29,812 in Town fuel reimbursements and \$43,956 in additional refund of prior years expenses.

FINDINGS OF THE STUDY

OUTSTANDING DEBT AS OF JUNE 30, 2012

	Financial Characteristic/ Element	Madison	Stockbridge Valley	Observation/Items to note or consider:
1	Enrollment	446	489	These enrollment numbers are from 2010-2011.
2	Serial Bonds Due at 6-30-12	4,974,537	8,208,699	
3	Anticipated Bonding on Projects			
4	Total Estimated Debt	4,974,537	8,208,699	Madison has net fixed assets of \$9,909,000. Stockbridge has net fixed assets of \$18,338,000.
5	Total Estimated Debt Per Student	11,154	16,787	
6	Building Aid %	94.8%	95.0%	Includes 10% building incentive aid.
7	Estimated Aid Per Student	10,574	15,947	
8	Debt Per Student	580	839	
9	Funds Available:			
10	Debt Service Fund	713,978	190,186	Must be used to pay future debt service expense.
11	Funds Available Per Student	1,601	389	
12	Net Debt Per Student	(1,021)	450	

FUND BALANCE AS OF JUNE 30, 2012

	Financial Characteristic/ Element	Madison	Stockbridge Valley	Observation/Items to note or consider:
1	Restricted:			
2	Encumbrances (Purchase Orders Still Open)	320,886	166,419	Madison includes \$215,000 for special needs tuition, Stockbridge includes \$151,055 for transportation.
3	Unemployment Insurance	196,870	234,916	
4	Worker's Compensation			
5	Employees' Retirement Contributions	331,183	227,684	
6	Tax Certiorari	90,000	314,044	
7	Employee Benefit Accrued Liability Reserve	799,889	509,755	Madison has excess monies over compensated absences.
8	Capital Reserve (Voter approval required to establish and fund)	44,026	301,054	
9	Repair Reserve (Voter approval required to fund, public hearing to spend)		50,000	
10	Mandatory Reserve Fund			
11	Insurance		14,990	
12	Property Loss and Liability	432,302	300,000	
13	Tax Reduction			
14	Total Reserves	2,215,156	2,118,862	
15	Unrestricted:			
16	Appropriated Fund Balance to Reduce Taxes in 2012-13	380,449	650,000	Stockbridge more reliant on fund balance in budget.
18	Unreserved Undesignated Fund Balance (Subject to 4.0% of subsequent year's budget)	605,722	341,979	Madison is over the 4.0% fund balance limit.
19	Total Unrestricted:	986,171	991,979	Total unrestricted approximately the same.
20	Fund Balance as a % of 2012 Expenditures			
21	Restricted	27.06%	23.40%	Both districts have a high percentage of reserves to expenditures.
22	Unrestricted Appropriated to Reduce Taxes in 2012-13	4.65%	7.18%	
23	Appropriated Fund Balance for Other Purposes			
24	Unrestricted Undesignated	7.40%	3.78%	
25	Debt Service Fund Balance - 2012	713,978	190,186	

FINDINGS OF THE STUDY

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

OVERALL FINDINGS:

- Both districts maintain fund balance by not automatically spending all of approved appropriations. Both districts have excess revenues compared to budgeted expenditures within a 5 to 10% range which is acceptable.
- Madison’s annual expense for retiree health insurance is about 72% higher than it is for Stockbridge Valley.
- Both districts are comparable (within 3%) in expenses for general support, instruction and employee benefits.
- Both districts combined receive about \$110,000 in wind power payments annually.
- Stockbridge has an ongoing cooperative fuel purchase arrangement with the Town.
- Both districts have similar total reserves to offset future expenditures and/or reductions in state aid (\$2.2 million for Madison; \$2.1 million for Stockbridge Valley).
- Both districts each have about \$1 million of unrestricted fund balance. However, in the 2012-2013 budget, Madison appropriated \$380 thousand to reduce taxes; and Stockbridge appropriated \$650 thousand to reduce taxes. This pattern may not be sustainable if all of the expenditures of an approved budget in a given year are expended.
- Both districts are highly dependent on State Aid Revenues. (63% by Madison; 73% by Stockbridge Valley)
- Both districts have self-sustaining school lunch funds that do not require general fund expenditure to keep solvent.

A chart that shows the 2012-2013 property tax levies and rates of each of the school districts is provided below.

Town	Assessed Value Tax Levy 2012-2013	Assessed Value Apportionment 2012-2013	Equalization Rate	Full Value	School Tax Levy	Percent of Tax Levy	Tax Levy Dollars	2012-2013 Tax Rate
<u>Madison</u>								
Augusta	35,443,241	35,443,241	0.7050	50,274,101	2,910,668	35.357924%	1,029,151.78	29.04
Marshall	359,002	359,002	0.6500	552,311	2,910,668	0.388442%	11,306.26	31.49
Vernon	390,911	390,911	0.7500	521,215	2,910,668	0.366572%	10,669.69	27.29
Eaton	676,471	676,471	1.0000	676,471	2,910,668	0.475764%	13,847.91	20.47
Madison	76,072,723	76,072,723	0.8600	88,456,655	2,910,668	62.211828%	1,810,779.77	23.80
Stockbridge	1,705,481	1,705,481	1.0000	1,705,481	2,910,668	1.199470%	34,912.59	20.47
Total	114,647,829	114,647,829		142,186,234		100.00000%	2,910,668.00	2.05
<u>Stockbridge Valley</u>								
Oneida	8,407,415	8,407,415	1.0000	8,407,415	2,164,355	7.135452%	154,436.51	18.37
Eaton	8,776,680	8,776,680	1.0000	8,776,680	2,164,355	7.448851%	161,219.58	18.37
Lincoln	7,322,067	7,322,067	1.0000	7,322,067	2,164,355	6.214307%	134,499.66	18.37
Smithfield	6,835,055	6,835,055	1.0000	6,835,055	2,164,355	5.800976%	125,553.71	18.37
Stockbridge	82,020,856	82,020,856	1.0000	82,020,856	2,164,355	69.611873%	1,506,648.05	18.37
Augusta	456,345	456,345	0.7050	647,298	2,164,355	0.549368%	11,890.27	26.06
Vernon	2,862,440	2,862,440	0.7500	3,816,587	2,164,355	3.239173%	70,107.20	24.49
Total	116,680,858	116,680,858		117,825,958		100.000000%	2,164,354.98	1.84

A major challenge in this time period of less state support of local school district expenditures with state aid is the resulting influence on the local true tax rates of school districts. Historically, both the Madison

FINDINGS OF THE STUDY

and Stockbridge Valley school districts have diligently prepared yearly budget expenditures that as best as possible balanced student program offerings with what state funds were available and with the level of local property tax contribution thought to be affordable for their communities.

5. Historical Perspective of Referendum Votes of Each District Since 2005 there have been a total of 35 public referenda in the two school districts for the annual budget, bus purchases, and capital projects. All but 5 of the public referenda were approved by the voters since 2005.

HISTORY OF PUBLIC REFERENDA: MADISON											
BUDGET REFERENDUM				BUS REFERENDUM				CAPITAL BUDGET REFERENDUM			
DATE	\$ AMOUNT	# VOTED 'YES'	# VOTED 'NO'	DATE	\$ AMOUNT	# VOTED 'YES'	# VOTED 'NO'	DATE	\$ AMOUNT	# VOTED 'YES'	# VOTED 'NO'
5/17/11	9020507	168	86	5/17/11	99562.50	169	82				
5/18/10	9126794	172	80	5/18/10	116828	163	87				
6/16/09	9336303	215	90								
5/19/09	9336303	141	159	5/19/09	90083	181	114				
5/20/08	8986423	120	50	5/20/08	85855	130	34				
5/15/07	8457455	132	45	5/15/07	75970	135	41	5/15/27	\$1,400,000	126	51
								12/19/07	\$48,000	73	18
5/16/06	8059297	140	57	5/16/06	68095	148	48				
5/17/05	7790759	184	64	5/17/05		186	62				
HISTORY OF PUBLIC REFERENDA: STOCKBRIDGE VALLEY											
5/17/11	\$ 9,912,471	211	88	3/9/11	\$ 212,245	71	18				
5/18/10	\$ 9,712,445	189	58	3/9/10	\$ 196,414	96	27				
5/19/09	\$ 9,436,634	162	38	3/3/09	\$ 188,700	120	25				
5/20/08	\$ 9,273,261	147	36	3/4/08	\$ 163,465	187	33	3/4/08	\$ 5,832,000	197	25
5/15/07	\$ 8,899,887	152	35	3/6/07	\$ 162,000	118	24				
5/16/06	\$ 8,529,168	193	68	3/7/06	\$ 161,764	162	27				
6/21/05	\$ 7,811,807	212	173	6/21/05	\$ 46,440	137	247				
					\$ 75,324	135	234				
5/17/05	\$ 7,879,478	204	311	5/17/05	\$ 121,764	190	274				

B. The School Buildings in the Two School Districts

1. Pupil Capacity of Each of the School Buildings

The study provides a school building pupil capacity assessment that first documents how the instructional spaces in all of the school buildings of the two school districts are utilized in the 2011-2012 school year to deliver *the pre-kindergarten through grade twelve program including special education*. Second, it provides an assessment of pupil capacity of each building as defined by local class size teacher contractual definitions and the local school district goals of each school district.

The pupil capacity analysis of each school building starts on page -79- in the **DATA** section of the study report.

The pupil capacity analysis is based on the following assumptions:

- ✓ The pupil capacity analysis is based on delivering instruction with the following class size goals:
 - Pre-Kindergarten (Pre-School) 18 pupils
 - Kindergarten and grade 1: 20 pupils
 - Grades 2 and 3: 22 pupils
 - Grades 4, 5, and 6: 24 pupils
 - Grades 7-12: 25 pupils

FINDINGS OF THE STUDY

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

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

Given the above assumptions, the pupil capacity of the school buildings of the Madison and Stockbridge Valley Central School Districts are charted below:

Madison K-6 Pupil Capacity	Stockbridge K-6 Pupil Capacity	Madison 7-12 Pupil Capacity	Stockbridge 7-12 Pupil Capacity
336	312	363	375
Pre-K/Pre-School: 18 (36 half day)	Pre-K/Pre-School: 54 (108 half day)		
Total K-6 Pupil Capacity Currently Available:		Total 7-12 Pupil Capacity Currently Available:	
648		738	
<i>Anticipated K-6 Pupil Capacity Need in five years:</i>		<i>Anticipated 7-12 Pupil Capacity Need in five years:</i>	
456-554		417	
<i>Estimated use of available pupil capacity in 5 years: 85.5%</i>		<i>Estimated use of available pupil capacity in 5 years: 56.5%</i>	

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

Possible Opportunities:	Possible Challenges:
◇ A reorganization of the two school districts into one likely will not need new construction or massive renovations. Plenty of current pupil capacity to serve estimated future enrollments K-12.	◇ Determining which buildings get used for what purpose. Might be emotional for some.
◇ Reorganization might make better use of the school buildings of the current two school districts.	◇ The development of a student transportation program .
◇ Reconfiguration of grade levels housed in the various buildings could enhance education concentration and success; and could eliminate some costs for the short and long term.	

FINDINGS OF THE STUDY

2. Infrastructure Condition of the Existing School Buildings

Each district operates two buildings that house students in grades Pre-Kindergarten through grade 12. In addition, each has a bus/transportation facility to service its school buses. Stockbridge Valley also has an Agriculture Laboratory facility.

Each of the districts completed its five-year Building Condition Survey (BCS) during the 2010-11 school year as required by NYS law. Those documents, completed by licensed architects and/or engineers and filed with the New York State Education Department provide a thorough assessment of each of the buildings owned by the districts. In the hundreds of items and systems examined in each of the buildings, no items were judged “non-functioning” or “critical failure” (see DATA Section page -92- for definitions).

The summary of the Building Condition Surveys of each School District building begins on page -89- in the **DATA** section of the study report.

One item was deemed “Unsatisfactory” in the Madison PreK-12 instructional building; that being a minor 'pointing of exterior walls.' It was also recommended that the sidewalk near the bus garage be repaired. Some parking areas and sidewalks adjacent to the Stockbridge Valley building were recommended for repair as well.

The total combined estimated capital construction expenses for the two districts through 2015-2016 as per the Building Condition Survey Reports of 2010 is slightly under \$3 million; with most of this found in the Stockbridge Valley building.

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

While the Building Condition Survey Reports do suggest some relatively minor repairs, renovations etc, it is important to point out that none of the buildings would require major renovations to house students safely in the new district should reorganization occur. That is not to say that the reorganized district could not benefit from program enhancement renovations through a capital project. Upgrades to science classrooms; other instructional areas; agriculture instructional areas such as a greenhouse; software,

FINDINGS OF THE STUDY

hardware, networking, smartboards and other technology and computer laboratory upgrades; and athletic facilities might be provided as program enhancements.

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

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

Themes of observations by the Joint Community Advisory Committee with respect to the conditions of the buildings in the two school districts:

Possible Opportunities:	Possible Challenges:
<ul style="list-style-type: none"> ◇ The reorganized school district should be able to house safely all students and staff. No educational facility would require immediate additions, renovations or repairs. 	<ul style="list-style-type: none"> ◇ At some time prior to or within the first year of the reorganized district, management may wish to address some of the items identified in the Building Condition Surveys. Even though the reorganized district will have a 10-year window with its enhanced building aid ratio, it may need to commence a thorough review in year one of the merger.
<ul style="list-style-type: none"> ◇ The new District could avail itself of the 98% reorganization incentive building aid ratio that will exist for ten years. This state building aid ratio and subsequent contract with NYS could substantially fund repairs, renovations and program enhancement to all facilities and grounds. Coupled with capital reserves established through the reorganization incentive aid, many of these enhancements might be provided with little impact on the local taxpayer. 	<ul style="list-style-type: none"> ◇ In the housing plan to educate students in the reorganized district, some programs may be taught in classrooms or areas that were not originally designed for that aged student or program. Therefore, some retrofitting in subsequent years may be required to support program/curriculum delivery decisions made by the district. In no cases, should these classrooms or areas by themselves affect the quality of the educational program.

RECOMMENDATION:

If the Districts' communities affirm a reorganization as prescribed by law, the new district should immediately establish a Facilities Transition Committee to address the issues related to facilities, grounds

FINDINGS OF THE STUDY

and playing fields. This committee should have broad-based composition including, but not limited to, representatives from both merged districts; buildings and grounds staff, students, faculty, support staff, administration, parents, community and perhaps a school architect as an advisor.

The new District could avail itself of the 98% incentive building aid ratio that can be accessed during the first ten years of the new district. This state building aid for a newly-organized school district could substantially fund repairs and renovations to all facilities and grounds that could last and serve the community and generations of pupils far into the future.

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

The “*What If*” *Financial Picture* of a possible reorganized district described by the study includes the suggestion that funds be placed in a capital reserve with the approval of the voters. Once the reorganized district identifies a long range-facility plan with the community, the district and community will have an appropriate reserve to use toward the local funding of that facility plan which will qualify for 98% State Building Aid for all SED approved expenses.

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

FINDINGS OF THE STUDY

C. The Educational Program in the Two School Districts

1. Current Class Sizes Grades K-12

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

Madison Central School District Teacher Contract Language
There are no specific sections of Board Policy or clauses/pages in the contract with the Faculty Association.
Stockbridge Valley Central School District Teacher Contract Language
Page 9H of the contract with the Stockbridge Valley Teacher Association states: <i>The class size for each elementary teacher should not exceed 25 pupils per class. If the average class size for an elementary grade level exceeds 25, an aide will be made available to assist those classroom teachers affected for a period of time deemed reasonable by those teachers.</i>
Page 9I of the contract with the Stockbridge Valley Teacher Association states: <i>The class size for each instructional period in Grades 7-12 should not exceed 30 pupils with supervisory periods limited to 40 pupils per teacher. The District realizes these numbers to be excessive for optimum educational achievement, and will strive to keep the classes below these levels.</i>

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

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

Charted below is a summary of the grades kindergarten through grade 6 class section size ranges and averages in each of the two school districts as of October 1, 2011 (K-3 in Madison for grades K-3).

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

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

GRADE LEVEL	Madison Elementary	Stockbridge Valley Elementary	CLASS SIZE GOAL AS DEFINED BY THE DISTRICTS
K Range	17-18	19-20	
K Average	18	20	20
GRADE 1 Range	20-21	17-19	
GRADE 1 Average	17	18	20
GRADE 2 Range	14	16-17	
GRADE 2 Average	14	17	22
GRADE 3 Range	21	12	
GRADE 3 Average	21	12	22
GRADE 4 Range	20-21	17-18	
GRADE 4 Average	21	18	24
GRADE 5 Range	18	27	
GRADE 5 Average	18	27	24
GRADE 6 Range	18-21	19-20	

FINDINGS OF THE STUDY

Charted below is a summary of the grades 7 through 12 English class section size ranges and averages in each of the two school districts as of October 1, 2011.

2011-2012 SCHOOL YEAR GRADES 7-12 ENGLISH CLASS SECTION ENROLLMENTS AS OF OCTOBER 1, 2010

ENGLISH CLASSES GRADE LEVEL	Madison High School	Stockbridge Valley High School	CLASS SIZE GOAL AS DEFINED BY THE DISTRICTS
GRADE 7 Range	13-15	18-24	
GRADE 7 Average	14	21	25
GRADE 8 Range	15-18	16-17	
GRADE 8 Average	17	17	25
GRADE 9 Range	22-24	22-26	
GRADE 9 Average	23	24	25
GRADE 10 Range	14-16	19-20	
GRADE 10 Average	15	20	25
GRADE 11 Range	9-21	24-25	
GRADE 11 Average	15	25	25
GRADE 12 Range	20	16	
GRADE 12 Average	20	16	25

Findings:

- ✓ Across the two school districts three of the four sections at K are below the class size goal of 20 pupils; one is at the goal.
- ✓ Across the two school districts all four the four sections at grade 1 are below the class size goal of 20 pupils.
- ✓ Across the two school districts all four of the four sections at grade 2 are below the class size goal of 22 pupils.
- ✓ Across the two school districts two of the four sections at grade 3 are below the class size goal of 22 pupils and two are above the goal.
- ✓ Across the two school districts all four of the four sections at grade 4 are below the class size goal of 24 pupils.
- ✓ Across the two school districts three of the four sections at grade 5 are below the class size goal of 24 pupils and one is above the goal.
- ✓ Across the two school districts all four of the four sections at grade 6 are below the class size goal of 24 pupils.
- ✓ There are 22 class sections of English classes in grades 7 through 12 across the two districts; one section is at the goal of 25 pupils; one section is above the goal; 20 class sections are below the class size goal.

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

Possible Opportunities:	Possible Challenges:
◇ A larger geographic area to provide public education will help to deal with decreases or increases of school age population than would be possible in separate districts.	◇ As finances get tighter, will the separate districts have to raise the class size goals to meet an affordable total budget?
◇ A combined volume of students at each age level/grade level probably will allow the two districts to keep low class sizes and do it with the same or fewer employees than are now on staff.	◇ The lack of a volume of enrollment at certain grade levels in the two districts does not allow the individual school districts to fully use the skills of the staff they have already. For example, if there are only 15 pupils in a grade 7 class with a local class size cultural standard of 24 pupils, then only 17/24 or 73% of the professional skill sets of the instructor are being utilized to serve pupils. Working to reach at least 90% of the grade level section class size goal is a good instructional goal and a good financial goal.

FINDINGS OF THE STUDY

<p>◇ Together the districts might have a better chance of keeping the lower class size goals and maintaining educational programs instead of having to increase them due to the lack of money to keep instructional staff.</p>	<p>◇ When pupil enrollments decline they usually decline across all grade level ages as opposed to just one or two grade level age groups. Low class section sizes may decrease even further without necessarily reducing expenses because of fewer children enrolled.</p>
<p>◇ Similar class sizes now generally indicate that the districts have similar philosophies regarding appropriate class size.</p>	<p>◇ If enrollment in both districts 7-12 population continued to decline, will the loss of these numbers be such that there will be a decline in the comprehensive set of courses able to be offered and still be affordable in each individual district?</p>

2. The Elementary Program Offerings

Members of the Joint Community Advisory Committee met to review elementary program information and ask questions of the respective districts’ leadership teams. Representatives of the K-6 program took part in a panel discussion with the CAC and answered questions and provided insights about their programs. These meetings took place after CAC members had time to review data sets relative to each of the program areas. The data sets found in the data section provide an overview of the program by listing out the various program elements of each district’s elementary, and 7-12 offerings. Members of the CAC were able to review a side-by-side analysis of the core and special area curriculum of each district.

This process of review included dedicated time at a CAC meeting to review and discuss both Madison and Stockbridge Valley’s elementary and secondary programs. Members then worked in their sub-committees to formulate questions they would want to ask of the school leadership team. The second part of the review consisted of the leadership teams detailing their ideas for enhanced program opportunities for students if a reorganization were to take place and additional funding was available.

The data set which begin on page -93- of the DATA section of the study provide a snapshot of the programs by listing out the various program elements of each district’s elementary offerings.

Major findings from the review of the elementary (K-6) program offerings include:

- ◇ Both Madison and Stockbridge Valley use a traditional grade level configuration to provide instruction. Teachers review academic performance and individual needs of students in order to have balanced classes that are, for the most part, heterogeneously grouped for instruction.
- ◇ Both programs have maintained their core offerings for elementary students that meet required mandates and provide for an elementary program as per Part 100 of Commissioner’s Regulations.
- ◇ There is a strong belief in both districts regarding the importance of early childhood education. Madison and Stockbridge Valley run full day pre-kindergarten programs at their schools.

FINDINGS OF THE STUDY

- ◇ There is limited staff available in the districts for counseling and support services. Both districts employ a K-12 counselor (in Madison, he is also the Athletic Director) and additional support is provided by a social worker when available. Psychological and other related services primarily are used to meet Individualized Educational Plans IEP requirements of special education students. Similar to other small districts in the area, this is an area that could use additional staffing to meet the needs of students at this early childhood level.
- ◇ Due to expenditure reductions, enrichment opportunities for students have been reduced. Presently it is provided by teachers in the classroom, but there is a strong sense among staff and the CAC that more needs to be done in this area.
- ◇ Speech instruction is available to meet mandated needs of students per IEP requirements and time is allocated for general education students.
- ◇ Expenditure reductions have limited after school opportunities, however, between the schools and their communities, they have continued to work hard to provide these opportunities where possible. After school soccer, baseball, wrestling are all offered at Madison and sponsored by the community and there is FFA for 6th graders, Marching Band and drama club available for elementary students at Stockbridge Valley.
- ◇ Both districts incorporate resource room instruction plus consultant teacher models to deliver instruction for special needs students. Madison and Stockbridge Valley have strong programs in this area and use multiple resources to provide support for special education students at the elementary level.
- ◇ Both CAC members and district staff expressed the importance of the culture at their schools and the caring support of the faculty and staff for the students. Additionally, it is apparent that each community holds their elementary schools in high regard. There is a strong feeling about the importance of the schools as the educational and cultural hub of the local communities.
- ◇ Members of the CAC and the district leadership teams expressed concerns about what continued budget cuts will do to the elementary programs of both districts.

Themes of observations by the Joint Community Advisory Committee regarding the Pre-Kindergarten through grade 6 program offering in the two school districts:

Possible Opportunities:	Possible Challenges:
<p>◇ With a reorganization, CAC members felt that Madison and Stockbridge Valley would have the opportunity to provide more program options for students both during and after school. Members expressed hope that enrichment could be enhanced and more students could take part in enrichment programs.</p>	<p>◇ The number one concern of the CAC is the challenge of maintaining school identity and spirit. There are strong feelings about the elementary programs at Madison and Stockbridge Valley and CAC members voiced their feelings about the potential of losing the culture of the schools in a newly reorganized district.</p>
<p>◇ There is a need for more support services at the elementary level. CAC members shared their concerns that more students are coming to school with emotional and family problems and the school needs additional resources to better support these students</p>	<p>◇ Although the new district would still be small, CAC members believed a challenge would be making sure students did not slip through the cracks in the new district. In each of the schools, everyone knows everyone, so there is close watch on all students' progress. The question and challenge voiced was if this will continue in the new district.</p>

FINDINGS OF THE STUDY

<p>◇ Members of the CAC saw the potential for reorganization as a way to maintain important elementary programs. CAC members voiced concerns that budget cuts could disproportionately impact elementary programs, particularly in non-mandated areas of instruction, including enrichment type programming.</p>	<p>◇ Bringing together text and resource materials could be a challenge. Both districts have substantial budgetary investments in instructional materials and work will need to be done to ensure that as many of these resources as possible will be utilized.</p>
<p>◇ A reorganization could help to provide increased support for the arts at the elementary level. The elementary program has to share staff with the secondary program and this often limits the time the elementary school has for instruction in this area. Members of the CAC expressed optimism that increased funding could support more opportunities for students in the arts both during and after school.</p>	<p>◇ CAC members expressed the importance of keeping elementary level students close to home and recommended a building configuration that supported this concept. At the same time, members said there should be activities that combine the elementary schools from time to time to help foster a new sense of community.</p>
<p>◇ CAC members and the school leadership teams expressed hope that reorganization could provide funding that would support improved professional development opportunities for staff.</p>	<p>◇ If there is a movement of some staff with the new reorganization, this was seen as being potentially both an opportunity and a challenge. It was agreed that there would need to be targeted professional development and administrative support to make the transition go as smoothly as possible. With APPR and the new accountability measures, there was concern expressed about how smoothly all of this would go in a newly combined district.</p>
<p>◇ . There is the potential for greater coordination and articulation of curriculum in a reorganized district. A similar time schedule, textbook series and support resources all would benefit students. In addition, with a new combined staff, the CAC felt there could be a stronger sharing of expertise of staff that would lead to improvements in the overall program.</p>	
<p>◇ An enhanced FFA program at the elementary level was reviewed as being very important to CAC members.</p>	

3. The Secondary Program Offerings

In a panel presentation format similar to those listed in the elementary program section, the CAC met with the superintendent, building principal, guidance counselor, teacher representative and athletic director to review and ask questions about the secondary program (Grades 7-12). Prior to this meeting, the CAC was given data related to the respective secondary programming of the Madison and Stockbridge Valley School Districts. The districts provide core instruction at the 7/8 grades in a traditional format for a junior high program. Staff is shared in both districts between the grade levels, making it difficult to develop a fully integrated middle level program. If the districts were to reorganize, there would be more opportunities to develop new programming that could support middle level instructional strategies.

The panel discussion between the staff and the Joint Community Advisory Committee members was an opportunity for discussion about how a secondary school must serve a range of pupils who may have college goals initially after graduation as well as those with vocational and military goals. During the

FINDINGS OF THE STUDY

panel presentations, we asked district leadership teams to answer questions from the CAC members as well as to address the question:

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

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

Listed in the charts below are findings and observations related to the secondary programs of the two districts.

The data set which begin on page -96- of the DATA section of the study provide a snapshot of the programs by listing out the various program elements of each district's secondary offerings.

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

- ◇ At the 7/8 level, most core staff members teach another grade level or one subject outside of their certification areas.
- ◇ Due to continued budget reductions, there are few options for grades 7/8 students for after school programs. At the 9-12 level, both Madison and Stockbridge Valley have worked diligently to maintain as many after school opportunities for students as possible.
- ◇ Support services programs in counseling and psychological services for grades 7/8 are stretched. Both districts have one person K-12 as their guidance counselor and the social worker and psychologists provide support for crisis intervention. CAC members spoke very positively about the work of their guidance personnel, but recognized it is not an ideal situation, especially with the needs of Jr High students.
- ◇ To date, Madison and Stockbridge Valley have been able to maintain the major core elements of a comprehensive 9-12 program even in the face of continued budget cuts.
- ◇ Both districts have Spanish as their second language. However, neither district offers upper level Spanish courses. (IV or V)
- ◇ Both districts have opportunities for students in music and the arts. There are concert and marching bands in both districts as well as opportunities to take part in drama productions.
- ◇ Both districts have technology programs with elective opportunities for students. Course options include manufacturing, architecture drawing and design, and Mechanical Systems at Madison and Stockbridge Valley offers Ag Mechanics, Environmental Science, Ag Production, Equine Science and Intro to Horticulture.
- ◇ Business courses are offered at both districts. Various CAC members expressed concern that more options for business instruction for secondary students has eroded over the years.
- ◇ Both schools have options for students who wish to take advanced/college level courses.

FINDINGS OF THE STUDY

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

Possible Opportunities:	Possible Challenges:
<p>◇ CAC members expressed hope that a reorganized district with additional funding would allow for increased opportunities in agriculture instruction. There is a strong desire to increase options in this area both during and after school.</p>	<p>◇ Transportation was noted as a challenge and the need for more after hour's transportation for students to allow them to take part in extra-curricular activities that occur after the end of the school day.</p>
<p>◇ CAC members expressed hope that if there were to be a reorganization with new aid available, many of the courses/programs lost over the past several years could be brought back. In particular, courses that teach students basic skills understanding in finance and business were seen as being important to gain real world knowledge.</p>	<p>◇ Similarly to the elementary program, a major challenge revolves around identity and the allegiance CAC members felt to their secondary programs. This is an area that members felt would need a great deal of attention and specific activities should be established to help smooth the transition. All saw this as a central challenge as there are such strong feelings for both the Madison and Stockbridge Valley secondary schools.</p>
<p>◇ Additional funding could help support after school transportation that would make after school programs more accessible to all students. Since late buses have been cut back, this has hurt the ability of many students to take part in after hours programming. The CAC members emphasized this area as critical to providing equity in access to programs at the school.</p>	<p>◇ CAC members discussed the challenge presented to students if there was now one high school. This would mean one valedictorian, salutatorian, one lead in the play, the first chair in the band, etc. There was a concern that scholarships available to students could be lessened now that there would be one high school and more students vying for a limited number of openings.</p>
<p>◇ Additional resources could make it possible to bring on staff that could be designated to a particular level, i.e 7/8 or 9/12. Shared staff make it difficult to fully develop programs at both levels of instruction.</p>	<p>◇ Some CAC members wondered if there could be too many options for students in the new high school. Could this spread out the student involvement to a point there might be a great deal of involvement in many programs and activities, but none would be on a high level?</p>
<p>◇ A reorganization of the two districts could provide increased funding for professional development for school staff. This is an area that has been hard hit in both school districts over the past several years.</p>	<p>◇ The potential cost of textbooks and resources was discussed as a financial challenge; especially if many now being used have to be replaced in order to provide unified texts and resources.</p>
<p>◇ A reorganized district could help provide funding to maintain current interscholastic sports opportunities and perhaps even add additional options. Also, CAC members discussed the potential for intramural options. Members felt it was especially important to get more after school opportunities for students at the Jr. High level.</p>	<p>◇ There was concern noted as a challenge that should the districts reorganize, that through 'economies of scale' they could lose some of their best new teachers. CAC members recognize this has already happened in their individual districts, but felt this situation could become more of an issue with a potential reorganization.</p>
<p>◇ A reorganized district could allow for more opportunities in advanced programming such as second language. There could be the option to add another language in order to give students more choice in this area.</p>	<p>◇ CAC members discussed the challenge of enhancing programming at the secondary level and ensuring there are appropriate financial practices established to keep them for the long term. No one wants to see new opportunities for students and then have to drop them when the incentive funding decreases.</p>
<p>◇ CAC members expressed hope that there could be more opportunities for students in the area of career and technical education.</p>	

4. Interscholastic Athletics/Co-curricular/Music/Drama Offerings

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

FINDINGS OF THE STUDY

are remunerated for their services based upon contractual agreements developed through the collective bargaining process.

The complete inventory of co-curricular, athletic and music/drama program offerings are charted starting on page -101- of the DATA section of the study report.

Both schools compete in Section III of the New York State Public High School Athletic Association. Based on student enrollment; both are classified as a “Class D” school; and both are members of the Central Counties League. A reorganization of the two districts likely would result in the new school being classified as a “Class C” school for athletic competition within the Section and could require a change to a different athletic league within Section III. If a move were to occur, it would be to the Center State Conference where both schools are already members for girls' basketball.

Both schools offer opportunities within each sport season and offer roughly the same number of sports programs. However, Stockbridge Valley offers a few more levels than does Madison. During the benchmarked 2011-2012 school year, Madison offered 10 different interscholastic sports programs (including those combined with another school) at the varsity, junior varsity and modified levels (for a total of 19 teams). Stockbridge Valley also offered 10 different interscholastic programs, but with a total number of 25 teams at the various levels. This is exclusive of elementary programs. (It should be pointed out that Madison has a combined varsity football team and a combined golf team with Waterville; both of which compete in Class C.)

Within those sports teams, there is also a range of participation levels. In some cases, the level of student participation barely may be sufficient to field safely a competitive team. One comment made at the Committee meeting was that in some cases, “there are such a small number of students/participants that they all play and don't push each other.” On other teams, the participation level is sufficient to support the program.

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

Some members of the Joint Community Advisory Committee mentioned the importance in a reorganized school district that some existing school traditions from the former districts be maintained while new

FINDINGS OF THE STUDY

traditions are created. They also believed it was important that additional athletic opportunities be made available to order to ensure that if any student wants to participate there is an athletic activity or team that the student can pursue. In keeping with the advice of the Joint Community Advisory Committee that new opportunities for the students are created in the athletic, music/drama and co-curricular programs, the estimated expenditure budget for a reorganized district includes an additional \$20,000 above the expenditures currently budgeted by the two districts separately.

Themes of observations by the Joint Community Advisory Committee and Directors of Athletics with respect to interscholastic athletics:

Possible Opportunities:	Possible Challenges:
◇ A reorganized school district with a larger student population base may be able to offer more and different athletic opportunities for its students. Depending on student interest and community interest and support, the new district may be able to add new sports teams (ie there may be enough interest in the district to support a wrestling program on its own)	◇ An increase in the number of student athletes through a larger student body creates a situation whereby fewer opportunities (or slots on a team) may exist for an athlete to participate on the team or position of his/her choice (i.e. a starting point guard in the former district may not start on a reorganized district team).
◇ The reorganized district may be able to provide junior varsity or modified teams in more sports in which they currently participate, pending student interest	◇ With one team per sport (vs. two teams currently), it reduces the total number of slots available to play. With more student athletes to select from, the competition to be selected for a particular team or for playing time may increase. Some students may choose not to participate.
◇ All students would be eligible to participate in sports that might not be offered in their current district, but are offered in the other district. (i.e. Cross country, bowling; tennis).	◇ The transition of supporting a different school with different loyalties may be difficult for some. The sense of identity with the local school (and community) will change. Traditional rivalries may be lost.
◇ With more sports teams available, more students might have the opportunity to play a high school sport.	◇ The current schools are familiar with playing in Section III Class D for sectionals and the NYS tournaments. The new, larger student enrollment could place the new district in Class C. It could take time for the new athletic program to adjust to the new level of competition. It is possible that the local teams may not be prepared for the level of competition that comes with the new classification.
◇ Intramural sports opportunities to involve more students than those participating in interscholastic teams may be developed (elementary through high school). Currently, none exist in the two districts.	◇ Reclassified to Class C could require a change in sports leagues and in opponents. This also could increase the travel time for students and costs to compete with schools in other areas. This shift could eliminate some traditional school rivalries.
◇ A larger talented pool of teachers and others who are available to coach specific sports.	◇ The new district will need to set up a process to identify, select and remunerate the coaching staffs from among the current quality coaches for many of the combined sports. One 'head coach' would be needed for a sport where two were needed prior to reorganization.
◇ Late buses Monday through Friday may enable students to participate in athletics, co-curricular activities, and music/drama as an option because of the resources available to accommodate all students of the entire district.	◇ Initial cost to replace an entirely new set of uniforms and possibly new equipment needs to be planned and phased in.
◇ The cooperative development of a new set of policies reflecting cultural issues and priorities will need to be established (i.e. policy about cutting; sportsmanship; academic eligibility; rubric for evaluation of skills).	◇ The cooperative development of a new set of policies reflecting cultural issues and priorities will need to be established (i.e. policy about cutting; sportsmanship; academic eligibility; rubric for evaluation of skills).
◇ The various town feeder programs (i.e. basketball; soccer) could be coordinated with community sponsors and coaches.	◇ The various town feeder programs (i.e. basketball; soccer) should be coordinated with community sponsors and coaches.

FINDINGS OF THE STUDY

<p>◇ Since each district prior to any reorganization has good quality facilities, gymnasiums and playing fields, there will be more gym space available for practices at all levels as well as good quality fields for all playing levels.</p>	<p>◇ The perception by some that student athletes may be chosen for teams based on 'location' in the new district.</p>
<p>◇ It is possible that if athletic leagues were to change due to reorganization, that distances and travel time to competitions may decrease</p>	
<p>◇ Exposure to increased levels of competition may increase the skill levels of individual or team athletes. It may also enhance the opportunity for a continuum of consistent skill development within the athletic program from elementary school through high school.</p>	
<p>◇ The increased level of competition that may come from reorganizing coupled with a more favorable state building aid ratio might provide an opportunity to further enhance the athletic facilities, playing fields and equipment.</p>	

RECOMMENDATIONS:

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

MUSIC/DRAMA AND CO-CURRICULAR ACTIVITIES

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

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

FINDINGS OF THE STUDY

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

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

5. State Student Assessment Data and High School Graduation Data

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

Both districts administered appropriate and required New York State student assessments during the four school years reviewed (2007-08 through 2010-11; the later being the last year data was available from the SED at the time of the study). The assessments and data reviewed include grades 3-8 mathematics and English Language Arts (ELA) along with grades 4 and 8 science tests; *High School Regents Examination Scores*; and *High School Graduation Diplomas and Graduation Rates*. Published results on all this data have been obtained from the New York State Education Department website and can be found in the DATA section of the study. Published results for 2011-2012 were not available at the time. In addition to assessment data, the Study Team also collected a sample of student post secondary pursuits of each school and listed the plans of graduates from the classes of 2009-2012. The Study Team also charted the schools high school graduates since the class of 2003 with regard to college attendance, persistence and degree attainment as provided through National Clearinghouse Data.

The summary of the student performance measures and post secondary data begins on page –107- of the DATA section of the study document.

FINDINGS OF THE STUDY

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

Therefore, in reviewing the assessment results in totality, there appear to be more similarities than differences in the student assessment performance as measured by the New York State Assessment tests between the two school districts. The data consisting of the percentages of students who scored at or above a Level 3 for the four school years from 2007-08 through 2010-2011 state assessments is charted below. Level 3 is defined as “Meeting Learning Standards; student performance demonstrates an understanding of the content expected in the subject and grade level.” It should also be noted the high percentage of students scoring at or above Level 2.

STOCKBRIDGE VALLEY CENTRAL SCHOOL STUDENT PERFORMANCE - PERCENTAGE SCORING AT LEVELS *

TEST	NO. TESTED	LEVEL 2-4	LEVEL 3-4	LEVEL 4	NO. TESTED	LEVEL 2-4	LEVEL 3-4	LEVEL 4
GR 3 ELA	38	97	68	0	31	94	65	29
GR 3 MATH	38	95	63	3	31	97	68	26
GR 4 ELA	25	100	64	0	41	95	39	2
GR 4 MATH	25	100	64	16	41	98	51	15
GR 4 SCIENCE	25	100	100	72	41	98	98	76
GR 5 ELA	40	93	50	3	37	97	51	8
GR 5 MATH	40	98	60	13	37	97	54	14
GR 6 ELA	39	97	64	3	32	91	56	0
GR 6 MATH	39	92	38	10	32	94	69	19
GR 7 ELA	38	92	34	0	46	93	52	13
GR 7 MATH	38	95	61	16	46	91	72	35
GR 8 ELA	49	92	27	2	49	92	27	4
GR 8 MATH	49	96	63	8	49	90	41	4
GR 8 SCI	49	96	73	27	48	98	73	15

TEST	NO. TESTED	LEVEL 2-4	LEVEL 3-4	LEVEL 4	NO. TESTED	LEVEL 2-4	LEVEL 3-4	LEVEL 4
GR 3 ELA	42	95	81	7	42	95	81	12
GR 3 MATH	43	100	95	23	39	95	95	23
GR 4 ELA	37	95	78	3	40	88	45	0
GR 4 MATH	38	92	92	32	38	89	74	8
GR 4 SCI	38	97	95	84	37	97	89	43
GR 5 ELA	35	94	77	6	45	93	76	11
GR 5 MATH	34	97	91	12	45	93	78	13
GR 6 ELA	45	100	82	9	50	100	74	0
GR 6 MATH	45	98	89	9	48	96	79	4
GR 7 ELA	46	100	83	7	48	98	81	2
GR 7 MATH	47	100	91	17	48	100	92	31
GR 8 ELA	45	100	67	0	46	98	65	4
GR 8 MATH	45	100	91	18	47	98	87	21
GR 8 SCI	45	100	84	22	46	100	96	46

FINDINGS OF THE STUDY

MADISON CENTRAL SCHOOL STUDENT PERFORMANCE - PERCENTAGE SCORING AT LEVELS *

TEST	NO. TESTED	LEVEL 2-4	LEVEL 3-4	LEVEL 4	NO. TESTED	LEVEL 2-4	LEVEL 3-4	LEVEL 4
GR 3 ELA	38	92	47	5	35	86	54	9
GR 3 MATH	38	95	42	5	35	83	37	14
GR 4 ELA	34	85	59	9	43	91	56	0
GR 4 MATH	34	88	71	41	43	98	56	19
GR 4 SCIENCE	33	100	88	48	43	100	95	44
GR 5 ELA	39	90	62	13	32	91	56	13
GR 5 MATH	39	90	62	10	32	88	44	13
GR 6 ELA	29	93	66	0	37	84	62	11
GR 6 MATH	29	93	62	24	37	92	62	22
GR 7 ELA	36	92	56	6	48	98	60	13
GR 7 MATH	35	91	63	23	49	98	67	14
GR 8 ELA	45	98	60	0	36	86	44	3
GR 8 MATH	45	87	31	2	36	92	61	6
GR 8 SCI	45	100	87	22	34	91	88	15

TEST	NO. TESTED	LEVEL 2-4	LEVEL 3-4	LEVEL 4	NO. TESTED	LEVEL 2-4	LEVEL 3-4	LEVEL 4
GR 3 ELA	41	93	76	7	35	94	77	14
GR 3 MATH	41	100	98	17	35	97	94	26
GR 4 ELA	34	100	82	12	39	92	67	10
GR 4 MATH	34	88	74	29	40	90	75	23
GR 4 SCI	34	100	94	44	41	100	88	39
GR 5 ELA	40	100	88	23	45	100	89	0
GR 5 MATH	40	98	80	13	46	98	72	7
GR 6 ELA	45	100	100	0	41	98	63	0
GR 6 MATH	46	100	87	7	40	93	73	3
GR 7 ELA	42	100	76	5	32	100	78	3
GR 7 MATH	41	100	95	15	34	100	91	32
GR 8 ELA	34	100	74	6	34	94	38	0
GR 8 MATH	34	100	91	18	35	83	77	11
GR 8 SCI	34	100	88	24	34	94	82	18

In reviewing the results of the *High School Regents Examination Performance* from the three-year period of 2008-09 through 2010-11 for both districts, one difference appears to be, on some occasions, a higher percentage of students achieving above 65% as well as achieving “mastery” (or a score of greater than 85%) among the students in the Stockbridge Valley district. This was true in the mathematics and social studies areas. Otherwise, the results depicted on the chart below offer many similarities.

**FINDINGS OF THE STUDY
HIGH SCHOOL REGENTS EXAMINATION PERFORMANCE ***

REGENTS	YEAR	NUMBER TESTED		% AT OR ABOVE 55		% AT OR ABOVE 65		% AT OR ABOVE 85	
		MADISON	SV	MADISON	SV	MADISON	SV	MADISON	SV
COMPREHEN. ENGLISH	10-11	30	43	87	100	80	98	40	56
	09-10	38	37	95	97	92	92	32	49
	08-09	34	40	100	98	91	90	32	23
INTEGRATED ALGEBRA	10-11	39	42	92	93	85	93	5	5
	09-10	20	46	100	98	95	98	10	28
	08-09	49	39	98	100	88	95	12	23
ALGEBRA 2/ TRIG	10-11	8	20	63	79	63	65	13	15
	09-10	19	14	79	75	79	79	11	36
	08-09	NA	NA	NA	NA	NA	NA	NA	NA
GEOMETRY	10-11	10	29	90	100	70	100	30	31
	09-10	18	29	100	97	94	93	28	34
	08-09	37	0	70	-	51	-	8	-
GLOBAL HISTORY	10-11	36	43	81	93	75	86	31	51
	09-10	32	44	94	98	75	98	31	59
	08-09	46	41	93	95	87	90	22	44
US HISTORY & GOV.	10-11	26	44	100	98	92	95	50	70
	09-10	40	33	93	100	90	97	38	61
	08-09	34	41	100	100	91	95	44	46
LIVING ENVIRON.	10-11	37	44	100	100	95	89	38	25
	09-10	32	80	84	99	78	99	38	46
	08-09	37	36	92	92	89	89	35	28
EARTH SCIENCE	10-11	27	33	93	100	89	97	44	61
	09-10	22	4	100	-	100	-	55	-
	08-09	30	45	100	87	90	80	37	29
CHEMISTRY	10-11	12	21	92	95	75	81	25	24
	09-10	15	12	93	100	67	83	13	0
	08-09	25	15	84	100	60	80	20	0
PHYSICS	10-11	4	7	-	100	-	57	-	0
	09-10	13	8	85	88	62	75	15	13
	08-09	8	8	88	100	50	88	25	25
SPANISH	10-11	19	17	100	100	100	88	47	41
	09-10	11	12	100	100	100	100	55	33
	08-09	13	16	100	100	100	100	62	19
FRENCH	10-11	0	0						
	09-10	0	0						
	08-09	0	0						

* From New York State Education Department Report Cards Comprehensive Information Report

Charted below are the *High School Graduation Rates* for the years 2007-2010 as recorded by the State Education Department Report Cards. They represent the percentage of grade 9 students who four years later graduated with a high school diploma. While it is difficult to compare graduation rates for two schools based on four graduation classes, it does appear that a higher percentage of students graduating within the prescribed four years has been alternating between one district and then the other during the targeted years. The graduation rates showed no pattern of increasing or decreasing over this time period.

HIGH SCHOOL GRADUATION RATES *

YEAR **	COHORT COUNT	MADISON	STOCKBRIDGE VALLEY
2007 (2003 COHORT)	ALL STUDENTS	38	42
	GRADUATION RATE %	92%	90%
2008 (2004 COHORT)	ALL STUDENTS	30	48
	GRADUATION RATE %	83%	88%
2009 (2005 COHORT)	ALL STUDENTS	42	35
	GRADUATION RATE %	100%	86%
2010 (2006 COHORT)	ALL STUDENTS	41	44
	GRADUATION RATE %	83%	91%

*From New York Education Department Report Cards Accountability & Overview Reports

FINDINGS OF THE STUDY

Also charted below are the *High School Diploma Types* awarded by the two high schools and earned by students for the graduation years 2009, 2010 and 2011 as recorded by the New York State Education Department. In reviewing this data, it also appears that there are similarities. In both cases, a high number of students received Regents diplomas. However, it does appear that a slightly higher percentage of students in Stockbridge Valley achieved a Regents diploma and slightly more with “advanced distinction” over this period of time.

HIGH SCHOOL DIPLOMAS*					
YEAR OF GRAD	DIPLOMA TYPE	MADISON		STOCKBRIDGE VALLEY	
2010-11	TOTAL GRADUATES	40		29	
	REGENTS	34	(85%)	28	(97%)
	REGENTS ADVANCED DISTINCTION	9	(23%)	7	(24 %)
	IEP	1	NA	2	NA
	APPROVED HS EQUIVALENT PREP	0		0	
2009-10	TOTAL GRADUATES	34		41	
	REGENTS	31	(91%)	39	(95%)
	REGENTS ADVANCED DISTINCTION	11	(32%)	16	(39%)
	IEP	0	NA	0	NA
	APPROVED HS EQUIVALENT PREP	0		0	
2008-09	TOTAL GRADUATES	46		31	
	REGENTS	39	(85%)	29	(94%)
	REGENTS ADVANCED DISTINCTION	10	(22%)	12	(39%)
	IEP	0	NA	1	NA
	APPROVED HS EQUIVALENT PREP	1		1	

*From New York Education Department Comprehensive Information Reports

The study documents the pursuits of students from the two schools after they graduate from high school. This also reflects similarities. It appears that the trade schools, colleges and universities are relatively local and very similar in nature (see page -113- and -127- in the DATA Section for a full comparison).

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

FINDINGS OF THE STUDY

It should be pointed out that even though there are some minor differences in the assessment scores between the two school districts, there appear to be more similarities than differences. There is very little in this section of the reorganization study that should pose as a roadblock to a successful reorganization.

6. Regional Sharing with Other School Districts

It is possible that the new district if authorized may purchase a similar total of services from the Madison-Oneida BOCES as well as through cross-contracts with other BOCES in the state. Many of the specific purchased services may be the same. It is possible that the BOCES may turn to the new district to rent any available classroom space in order to provide regional programming in the buildings of the newly organized district. The newly formed district may have a more comprehensive set of programs that can be a major asset in integrating special needs pupils in skill areas they can excel in like any other pupil.

Special Education Services:

It is possible that the newly organized school district may purchase different shared services for special needs pupils because the new district may have enough students with a similar disability to provide the service at the home school with home school staff. Charted below are the numbers of special needs students served within the home schools and served outside the home schools as of December, 2012.

Special Needs Program K-12 As of December 2012	Madison		Stockbridge Valley	
	#served in the home district by the home district	# served outside the home district (by others, not the home district) -- pupils that may be in home district classrooms, but are enrolled in a regional program provided by BOCES.	#served in the home district by the home district	# served outside the home district (by others, not the home district) -- pupils that may be in home district classrooms, but are enrolled in a regional program provided by BOCES.
12:1:1 (15:1:1)	24	8	8	8
12:1:2				
8:1:1	0	3	0	4
autistic	2	0		
Emotionally, intellectually, learning, multiple disabled			8	6
Pre-school spec. needs	0	2		

FINDINGS OF THE STUDY

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

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

Over a series Joint Community Advisory Committee meetings, the members representing the two school districts identified the following options (A-G) for use of the existing school buildings to deliver the program if a reorganization is approved by the communities. The scenarios defined by the Joint Committee are based upon the mid-range enrollment projections calculated for five years from now; the pupil capacities defined by the pupil capacity analysis (page -46- in the DATA Section of the study); the class size goals of the two districts; and initial ideas of the Joint Committee of a future program vision of the elementary and secondary curricula that a reorganized school district could implement and deliver. Scenario C listed and shaded below is suggested by the study as the primary option for the possible new reorganized school district.

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

SCENARIO A
<i>Pre-K through grade 6 all at the Madison building; Grades 7-12 all at the Stockbridge building</i>
SCENARIO B
<i>Pre-K-5 at Madison building; Pre-K-5 at Stockbridge building; 6-9 all at Madison building; 10-12 all at Stockbridge building</i>
SCENARIO C
<i>Pre-K-5 at Madison building; Pre-K-5 at Stockbridge building; 6-8 all at Madison building; 9-12 all at Stockbridge building</i>
SCENARIO D
<i>Pre-K-4 at Madison building; Pre-K-4 at Stockbridge building; 5-6 all at Madison building; 7-12 all at Stockbridge building</i>
SCENARIO E
<i>Pre-K-4 at Madison building; Pre-K-4 at Stockbridge building; 5-8 all at Madison building; 9-12 all at Stockbridge building</i>
SCENARIO F
<i>Pre-K-4 at Madison building; Pre-K-4 at Stockbridge building; 5-7 all at Madison building; 8-12 all at Stockbridge building</i>
SCENARIO G
<i>Build one new K-12 building in a convenient location between both current school districts.</i>

FINDINGS OF THE STUDY

The Joint Community Advisory Committee discussed the scenarios with the leadership teams from each district in the context of *opportunities* and *challenges* associated with each scenario. Based on the discussion and consensus of the Joint Community Advisory Committee, the Study Team identifies Scenario C--- ***Pre-K-5 at Madison building; Pre-K-5 at Stockbridge Valley building; 6-8 all at Madison building; 9-12 all at the Stockbridge Valley building*** --- as the scenario which the study should suggest as the Primary Option to deliver the Pre-K through grade 12 program if a reorganization was approved by the communities.

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

*Pre-K through grade 5 at both the Madison building and the Stockbridge Valley building;
6-8 all at Madison building;
9-12 all at Stockbridge Valley building*

OPPORTUNITIES
Youngest of students served in the traditional neighborhood schools approach as is currently provided without having to adjust boundaries where K-5 pupils currently attend school; elementary attendance zones can remain coterminous with current school district boundaries of the two schools until such time the new district establishes another pattern, if any, that could advantage service to K-5 pupils.
Maintain and improve strong elementary programs by having the capability to keep current class size goals and provide a consistency across grade levels with curriculum mapping and research based testing measurements
Examining the state mandates for middle schools and adapting to a new environment that allows for enhanced opportunities above and beyond the mandates.
The 6-8 building will allow the development of a true middle school that uses teaming, an integrated curriculum, and techniques that focus on learning and adolescent development. Improved laboratory classroom for students in grades 6 – 8.
MCS students stay in one building through grade 8
Maximizes class sizes at 6-12
Allows for Project-based learning and STEM (science, technology, engineering, math) initiatives at 6-8
Increased opportunities to participate in more co-curricular and athletic opportunities.
Communication with BOCES and local colleges to create regional opportunities that inform and encourage understanding of emerging technologies that support global development in the capital region.
Centralized Administrative Office – combination of Superintendent, Business Official, Curriculum, Special Education, Transportation, Buildings and Grounds, and Athletics – more efficiencies
Renewed energy and enthusiasm through shared professional development. Larger departments with different perspectives.
More foreign language options for students
Addition of Pre-K program at both elementary schools.
Vertical and horizontal alignment of the curriculum is more possible – consistency. Completeness, and definition of mastery steps for pupils will be enabled and possible because there will be enough cohort of professionals working together to share best practices with instructional decision making.
Clear understanding of the objectives by all stakeholders of the possible merger – maintain and enhance educational opportunities for all students while being financially responsible.
Allows for the possibility of housing more special needs students in the home district.
CHALLENGES
Transporting students between existing buildings; keeping transportation time within 45 minute travel on a bus. Collaboration between district transportation supervisors and Transfinder once final configuration is determined.
Providing district wide professional development opportunities for all grade and building level faculty to ensure common core is being delivered consistently and efficiently with positive results.

FINDINGS OF THE STUDY

Examining the state mandates for middle schools and adapting to a new environment that allows for enhanced opportunities above and beyond the mandates.
Communication with BOCES and local colleges to create regional opportunities that inform and encourage understanding of emerging technologies that support global development in the capital region.
Understanding that not all students may not have the opportunity to be ‘the star’ to shine on the stage, court, or playing field.
Changing the way we’ve done things for years – purchasing, professional development, instruction, all aspects of change. Reason as to why it is better for students.
Merging of traditions between school districts and accepting change. Preserving core values and beliefs of both districts.
Requires coordination of start and end times of the various buildings and a transportation plan to accommodate the programs and grade configurations.
Deployment of best available talent to the grade level/building that best support students.
Major need for transition planning between faculty and support staff.
Multiple contracts and expectation of assignment time – faculty and support staff.
Clear understanding of the objectives by all stakeholders of the possible merger – maintain and enhance educational opportunities for all students while being financially responsible.
Greater transportation costs

E. School Day Time Schedule and Pupil Transportation

After discussing various ways to organize the grade level configurations in the current school buildings, the Joint Community Advisory Committee turned to analyzing pupil transportation. The Joint Community Advisory Committee in summary suggested the following assumptions that should guide decisions about school day times, transportation times, and bus runs/routing if the two districts did reorganize into one.

Assumptions:

- ✓ All Pre-K through grade 5 pupils attend the elementary school within the original school district ‘attendance zone’. However, parents who wish to have their elementary children attend an elementary school of the newly reorganized school district that is **closer** to their home may request that attendance at their discretion.
- ✓ The goal is to reduce the current longest ride of a child on a bus which is 60 minutes.
- ✓ Smaller (less than 66 passenger) buses will probably be used to transport pupils who currently live at the most outer limits of the current school district geographic boundaries.
- ✓ All pupils receive bus transportation in the two districts currently. The assumption is that the same service is provided in a reorganized school district. The current practice of door-to-door and/or centralized pick up points is expected to continue contingent on pupil safety considerations and characteristics at specific locations.
- ✓ It is expected that the reorganized school district continues the current practice of helping families as well as they can with transportation to day care locations depending upon the number of available seats on specific bus routes.
- ✓ It is suggested that existing routes with existing drivers be provided for at least the first year (or longer) of the reorganized district. Starting for year 2, study if there can be some combining of routing where boundaries of the two attendance zones are very close and/or redevelopment of some routes will reduce time for pupils to be on a bus.

FINDINGS OF THE STUDY

- ✓ It is a goal to ensure arrival and departure of Vocational Technical students at the BOCES center in Verona is closer to arrival and departure times of other students from other school districts thus maximizing the instructional time available at the Vocational Center for students.

CURRENT PERSONNEL DATA AS REVIEWED BY THE JOINT COMMUNITY ADVISORY COMMITTEE

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

Instructional Staff Contracts

The instructional staff benefits in the two districts evidence areas of similarity that one might expect from two districts that have such similar community demographics. Both districts are rural with similar CWR statistics and have many commonalities. Therefore, it is not surprising to see language in the two contracts that is alike. For example, the length of the work day is identical, leave language is very similar (12 sick days in Madison and 12 in Stockbridge Valley, as well as 5 bereavement days for both) and they have the same number of personal days and up to 2 years of maternity leave.

That said, continuing to look at the analysis of the two contracts shows there are some major differences in language and benefits between the two. There is a significant difference in prep time at the elementary levels. Whereas Stockbridge Valley has a traditional 30 minute duty free lunch and a 30 minute prep period, Madison has a 30 minute duty free lunch period, a 50 minute per day prep period plus an additional 50 minute planning period once per week and they also have a 30 minute team planning period per day. Therefore, Stockbridge Valley elementary faculty have a total of 150 minutes per week and Madison faculty have a total of 450 minutes; a dramatic and significant difference. At the secondary level, both districts have a six period maximum class load for faculty. The pattern for Madison holds with the same format as the elementary while the secondary staff at Stockbridge Valley has at least 10 prep periods per week. (Double the amount of time given to the elementary staff, but still less overall time than Madison teachers.) This large a difference in the makeup of the work day for the two districts' instructional staff could pose a major challenge if they were to reorganize and then have to create a new contract for the district.

The salary structure of the two districts' instructional staff also could pose a significant challenge in developing a new contract. The negotiations for new contracts in a reorganized district can be a complicated process that must be collaboratively accomplished. Like negotiations in most districts, the major elements consisting of salary and health insurance benefits are often the most difficult to finalize. In the case of Madison and Stockbridge Valley, the salary structure as seen below points out the potential

FINDINGS OF THE STUDY

challenge of developing the new contract. The Madison contract allows a range of salary at the step levels (a good option if the district has to go out and attract a staff member in a difficult tenure area, i.e. physics, second language, chemistry), but at the base level of the step it lags behind the salary of Stockbridge Valley. That said, salary is increased at Madison through longevity steps where Madison's longevity is \$1,245.00 and Stockbridge Valley's is \$475.00.

Wage/Salary Benefits: Instructional Staff

Starting Salary	2012-2013	
	Madison	Stockbridge-Valley
B1	\$32,740-51,509	\$38,160
B2	33,499-52,301	38,660
B3	34,288-53,090	39,175
B4	35,099-53,884	40,105
B5	35,861-54,674	40,668
M1	36,679-58,443	43,368
M2	37,449-59,231	44,596
M3	38,254-60,024	45,740
M4	39,012-60,814	46,451
M5	39,873-61,606	47,163
M6	40,636-63,389	49,059 (3% off step increase)
Masters' degree	+1,384	+600
Longevity		
5 years	+1,245	
7 years		+475
10 years	+1,245	+475
15 years	+1,245	+475
20 years	+1,245	+475
25 years	+1,245	+475
29 years		+3,333 (non-cumulative)
30 years	+1,245	+1,300 + 3,333 (non-cumulative)
31 years		+ 3,333 (non-cumulative)
32 years		+10,000

Health Insurance Benefits: Instructional Staff

Both districts have language that flexes the amount of money the district pays for health insurance based upon employee start dates. At Madison, an employee with less than 3 years has the district contribute 90% of an individual plan and 65% of a family plan. After three years the percentages change to 95% for individual and 90% for family. At Stockbridge Valley, employees hired after July 1, 2012 will have the district provide 88% of individual and 88% of family. For staff hired prior to that date, the employee pays a maximum amount of \$800 for an individual and \$1,200 for a family plan.

RX copays are similar in both districts and both districts offer an opt out plan that is relatively the same. (\$900 for individual and \$2,400 for family in Madison and \$1,250 for individual and \$2,500 for family in Stockbridge Valley.) Additionally, both districts provide for the cost of health insurance for retirees with

FINDINGS OF THE STUDY

no change in contribution for Madison retirees as they had during active employment, whereas Stockbridge Valley employees have to pay for a greater share of their cost in retirement.

Instructional Staff	Madison	Stockbridge Valley
Benefit Plans	Excellus PPO Plan	
Employee Contributions	Less than 3 years: Madison CSD contributes 90% for individual and 65% for family. 4 th year of employment: 95% for individual and 90% family.	After 7/1/2012, District pays 88% of an individual and 88% of a family plan. Prior to 7/1/2012, employees pay a max amount of \$800 for an individual plan and \$1,200 for a family plan
RX Co-Pays	10/20/35 with two co-pays for mail order of a 90 day supply	10/20/35 with two co-pays for mail order of a 90 day supply
Opt Out Plan	\$900 for individual and \$2,400 for family	\$1,250 for individual and \$2,500 for family
Retiree Contributions	Minimum of 10 years employment, health coverage in retirement same as active emp.	District pays 80% of individual and District provides family plan with retiree paying 45% of the difference between the cost of the individual and family plan

There is one other benefit for retirees that should be noted due to the large disparity in the benefit. In Madison, if a teacher has had 10 years of continuous service at the time of retirement, the qualified teacher shall receive a dollar amount prior to deductions equal to ½ of his/her regular salary for the his/her last fiscal year of employment with a cap of \$31,000, plus \$60.00 per day of unused sick leave. At Stockbridge Valley, the faculty member must have been employed for 20 years and will then receive \$5,000 plus \$100.00 for unused sick leave up to 225 accumulated days.

Instructional Support Staff Contracts

The instructional support staff wages/benefits in the two districts are considerably more similar in nature than the instructional staff benefits noted in the information above. For example:

12 month employees receive 12 sick days per year in Madison and the same in Stockbridge Valley. (10 month employees receive 2 more days per year in Madison than Stockbridge Valley.) They receive 3 bereavement days in both districts and Madison staff receive 3 personal days and Stockbridge Valley are allotted up to 5 days. Both districts' 12 month employees receive 13 paid holidays and 10 month employees paid holidays are per the district calendar. Similarly, vacation time is close to the same in both districts with first year employees receiving 10 days, and then Madison staff are entitled to one more day per year up until the sixth year of employment. (Stockbridge Valley staff end up with 11 days and Madison with 15.) By the 10th year of employment, both districts' 12 month support staff receive 15 days of vacation time. There is a retiree benefit tied to unused sick days in both districts (\$35 per day in Madison and \$25 in Stockbridge Valley) with the Madison amount due to the employee at retirement and

FINDINGS OF THE STUDY

the Stockbridge Valley employee has his/her amount placed in an account to offset the retiree's cost of health insurance premiums.

Wage/Salary Benefits

The salaries listed below show Madison staff with higher start rates but end up with Stockbridge Valley having slightly higher end rates.

Sample Salaries for Instructional Support Staff/Hourly Rates of Pay based upon 2012/2013 school year. Rates of pay listed are starting rate ranges.		
	Madison	Stockbridge Valley
Cleaner	\$10.76-11.49	\$9.00-11.03
Food Service	\$10.76-11.49	\$9.00-11.79
School Nurse	\$27,287-28,726	\$27,983-46,018
Cook Manager	\$28,948-31,534	\$16.20
Teacher Aide	\$10.76-11.49	\$9.00-11.79
Bus Driver	\$14.43-15.21	\$13.55-15.98

Health Insurance Benefits

Both districts participate in the Madison-Oneida-Herkimer Consortium Plan. Contribution rates are similar as noted in the chart below detailing the different districts' plans. There is a slight difference in the RX plan between the two, but the dental plans show larger differences in contribution rates and there also is a larger disparity in the opt out plan.

Support Staff	Madison	Stockbridge Valley
Benefit Plans	MO BOCES Consortium Plan	MO BOCES Consortium Plan
Employee Contributions	Before 1/21/99, District pays 95% individual and 90% family. After 1/21/99 and a minimum work week of 15 hours, District pays 90% of individual and 65% of family for employees with less than 3 years in district. After 3 years, coverage for family goes to 90%.	Employees other than cafeteria and transportation are eligible if they work more than 50% or more of the defined work day. Bus drivers and food service workers must work 20 hours per week. The District contributes 90% for the individual plan and 90% for the family plan. For employees hired before 7/1/10, premium contributions will not exceed \$600 for individual and \$850 for family.
RX Co-Pays	\$10/\$20/\$30	\$5/\$15/\$30
Opt Out Plan	\$750 single plan or \$1,500 for family	\$1,250 single plan, \$2,500 for family
Retiree Contributions	Effective 1/2007, staff hired before 1/21/99, district pays 95% individual and 90% family. After 1999, 90% individual, 65% family if they worked for less than 3 years prior to retirement, 90% if more than three years.	Retirees pay 45% of difference between individual and family premiums annually

With or without a reorganization of the two school districts, it is likely that the increasing cost of health insurance and the increasing cost for retiree health insurance will be topics for ongoing collaborative discussion in contract negotiations for some time to come. Both districts have attempted to deal with this issue by delineating rates of contribution based upon when the employees were hired. Newer employees have to contribute a higher rate than those hired previously. A challenge to note for Stockbridge Valley is the fact that employees hired prior to the new rates have their contributions capped at a dollar amount.

FINDINGS OF THE STUDY

Health insurance rates are continuing to climb and the district has to take on the majority of the increase for the cost as the staff does not contribute a percentage amount. Similar strategies for retiree benefits are pegged to when employees were hired in an effort to place some controls on these increasing costs.

There is another opportunity/challenge to note regarding the contracts of the two districts. The incentive aid that will go to the two districts should they centralize may help to support and increase programs for students, improve the long term fiscal stability of the district, and help to moderate the tax levies for the taxpayers of the new school district. Additionally, part of the new incentive aid is used to help create new labor contracts with each employee labor unit. There will be many conversations between the labor units and the board of education during the negotiation process relative to new language, benefits, and salaries. At this time of economic distress nationally, the negotiations process should be an open dialogue between all parties to craft reasonable agreements that are balanced in all areas. As with many aspects of our economy, “business as usual” actions probably will not ensure a viable long-term financial plan for the school district or for the employees. Particularly in the instructional agreements of Madison and Stockbridge Valley, there are significant differences in the two contracts. If the districts were to reorganize and the best of both contracts were brought together, this could place a long term financial burden on the new district

In previous school district reorganizations in the 1980’s and 1990’s this practice of ‘leveling up’ salary amounts among existing salary schedules was common and the main focus of establishing new contracts with the new school district. The practice of “leveling up” that has taken place in previous mergers is not required as a starting point for negotiations. It is suggested that the process of coming to collaborative agreement on new contracts for a reorganized district be globally focused on how to *balance all elements* of remuneration including health insurance benefits, leave time, salary and other items that have specific dollar benefits for employees.

A profile of the major elements of the instructional and instructional support labor contracts starts on page -128- of the DATA section of the study.

The DATA Section starting on page -128- includes a *Q and A* about the process with regard to personnel when a school district reorganization occurs through centralization. The process is guided by New York State law, case law, and the Public Employee Relations Board (PERB) decisions. If the communities approve of a reorganization of the school districts, the employee groups then choose what bargaining agents will represent them. This is an employee responsibility and the Board of Education is not involved. Once the new bargaining units identify their bargaining agents, then the agents and the new

FINDINGS OF THE STUDY

school district must make a good faith effort to negotiate new collective bargaining agreements. The new negotiated agreements do not have to be in place by July 1, 2014. The existing agreements specific to each school district are administered until a new contract is agreed upon and ratified.

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

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

Summary of FTE Personnel Costs Benchmarked to 2011-2012

STAFF SEGMENT	Average FTE Cost
Pre-K through grade 6 certified teachers (including counselors, nurses and similar others):	\$69,794
Grade 7-12 certified teachers (including counselors, nurses and similar others):	\$70,528
Grades K-12:	
Teacher Assistants (certified)	\$36,530
Teacher Aides (civil service payroll)	\$26,222
Grades K-12:	
OT/PT (civil service payroll)	
Social worker (civil service payroll)	
Nurse (civil service payroll)	\$53,715
K-12 certified administrators:	
All district administrators including the business official if she/he serves in a civil service position	\$124,763
On Civil Service payroll: (CONSIDERED FTE’S)	
Supervisors of any support function	\$60,334
Bus drivers	\$31,470
Bus aides	\$31,915
School lunch workers	\$29,763
Operations and Maintenance workers	\$43,385
Secretaries	\$44,189
Business Office staff <u>other</u> than secretarial OR business official	\$95,445
Technology support staff	\$79,351
CONSIDERED HOURLY EMPLOYEES ON THE CIVIL SERVICE PAYROLL	
Bus drivers	
Bus aides	
School lunch workers	
Part-time cleaners	

FINDINGS OF THE STUDY

A profile of the number of staff in each segment by each district and the total expenditure in 2011-2012 of each segment starts on page –128-- of the DATA section of the study.

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

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

An *economy of scale* is usually achieved with a reorganization of school districts. As such, financial savings are often achieved by not having duplication and redundancy in program offerings. Therefore, student program elements that do not exist now are sometimes possible through school district reorganization using *existing* funds because duplication by combining two districts is addressed in a reorganization. The reorganization of the two school districts into one will likely include additional student program elements *and* reduction in force of some employees and/or changes in how current employees serve their pupils now and/or the hiring of some different staff with different skill sets.

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

Charted below are the total numbers of various segments of staff of the two separate school districts who have left both districts for all reasons not including reduction in force by either school district over the past four years from 2007 – 2011. Over the past four years, 37.8 instructional and support staff FTE’s have left the two districts.

	MADISON				STOCKBRIDGE VALLEY				TOTAL OVER 4 YEARS
	2010-2011	2009-2010	2008-2009	2007-2008	2010-2011	2009-2010	2008-2009	2007-2008	
STAFF SEGMENT									
Pre-K through grade 6 certified teachers (including counselors, nurses and similar others)	1			1	2		1	1	6
Grade 7-12 certified teachers (including counselors, nurses and similar others):	1.5	3.5	3	1	2	2			13

FINDINGS OF THE STUDY

Grades K-12:									
Teacher Assistants (certified)		1					1		2
Teacher Aides (civil service)		2							2
Grades K-12: OT/PT (civil service)									
Social worker (civil service)									
Nurse (civil service)									
K-12 certified administrators:	1		2	1					4
Civil Service:									
Supervisors of any support function		1				1			2
Bus drivers		2	1						3
Bus aides									
School lunch workers						.4	.4		.8
Operations and Maintenance workers						1	1	1	3
Secretaries	1					1			2
Business Office not secretarial									
Technology support staff									

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

The normal historical pattern of employees who leave the employment of the two districts in total suggests that it is quite possible that normal attrition will allow for only a few employees, if any, to actually have to experience reduction in force if a reorganization was authorized by the two communities which implements the student program elements outlined in the 'reorganization roadmap' suggested by the study.

A profile of the number of each staff segment by each district who left their district is on page -149- of the DATA section of the study.

What might a 'reorganization' roadmap look like?

Where would the students go to school?

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

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

FINDINGS OF THE STUDY
Pre-K-5 at Madison building;
Pre-K-5 at Stockbridge building;
6-8 all at Madison building;
9-12 all at Stockbridge building

Madison			Stockbridge Valley		
School	PUPIL CAPACITY	EST. ENROLL.	School	PUPIL CAPACITY	EST. ENROLL.
Grades K - 5 in the current elementary section of the school building:	336	256 (76.2% of building capacity)	Grades K - 5 in the current elementary section of the school building:	312	230 (73.7% of building capacity)
Pre-Kindergarten	36	36 full day or 72 half day	Pre-Kindergarten	36	36 full day or 72 half day
Grades 6-8 in the current secondary section of the school building:	363	199 (58.8% of building capacity)	Grades 9-12 in the current secondary section of the school building:	375	286 (76.3% of building capacity)

FINDINGS AND CONSIDERATIONS WITH REGARD TO THE USE OF FACILITIES:

- ✓ The two school buildings with the grade level configurations proposed have sufficient pupil capacity to accommodate the *high* enrollment projection estimated for five years from now and to have unassigned capacity to allow for flexibility of delivery of the program at all grade levels.
- ✓ In addition, there looks to be ample space in the buildings to rent to the BOCES to serve special needs pupils on a regional basis. There looks to be space available in the buildings to rent/house related community services in collaboration with other agencies in the county.
- ✓ It is suggested that the new district house the central administration services in the current space allocated in the Stockbridge Valley School Building. The current space for district office functions at the Madison School Building could be used to house the K-8 building principal.
- ✓ Even though it is likely that each school of the two school buildings will have ample unused pupil capacity initially, it is strongly suggested that the new district see this available unused capacity as an asset for the new school district. For example,
 - ◇ If a surge in the economy, housing and jobs occur, the new district will have instructional space ‘ready-to-go’ to use to plan how to deal with any possible new enrollment.
 - ◇ The district has marketable space to rent to the BOCES for regional programming in functioning age-appropriate settings.
 - ◇ The district has in-house space to use conveniently for staff development; for partnerships with higher education institutions to deliver graduate courses regionally to adults; for partnerships with other municipalities and service agencies to better serve the community by housing programs in the building.

FINDINGS OF THE STUDY

What might the program for students look like?

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

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

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

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

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

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

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

FINDINGS OF THE STUDY

of the student program elements for a reorganized district suggested by the various Joint Advisory Committee members appointed to help with the feasibility study.

Grades K-6

- Enrichment opportunities for all students
- Keep current with instructional technology
- Provide more support services for students in need
- Provide more tutoring, ‘extra help’ instructional services
- Expand extra-curricular clubs and athletics
- Provide more professional development for faculty and support staff
- Allow class sizes well below 27 to 30 pupils per class

Grades 7-12:

- Maintain and improve the agriculture program offering
- Increase course offerings for all students
- Strengthen the FFA Program with more opportunities
- Support more students in a the Marching Band with ‘music coaches’
- Enrichment opportunities for all students
- Additional late bus runs to support participation of students
- Expand extracurricular and sports opportunities
- Assure and expand career tech opportunities for all students through BOCES
- More life skills/business program opportunities for students
- AP/college course offerings
- Provide more support services for students in need
- Provide more tutoring, ‘extra help’ instructional services

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

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

Class sizes

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

▪ Pre-Kindergarten (Pre-School)	18 pupils
▪ Kindergarten and grade 1:	20 pupils
▪ Grades 2 and 3:	22 pupils
▪ Grades 4, 5, and 6:	24 pupils
▪ Grades 7-12:	25 pupils

Pre-Kindergarten Education

Includes 4 full time Pre-K teachers district-wide in the reorganized school district. There are currently 3 full-time Pre-K teachers. In this way, Pre-kindergarten education can serve up to 144 pupils with up to eight half-day classes or a combination of half-day or full-day classes.

FINDINGS OF THE STUDY

Special Needs Classes

It is possible that more special needs pupils may be able to be served in the new school district as opposed to having to travel to an out of district site. In 2011-2012 there are 31 special needs pupils of the two school districts served by non-home school providers. ‘Least restrictive environment’ and ‘educationally sound’ criteria must guide the decisions as to which program is best for these unique students. It is possible that the resources and collective talent in the new school district may enable the district to deliver more programs for many of these students at the home district.

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

Comparison of Current Grades K-6 Classroom Section Instructional Staffing in Both Districts with a “What If” Staffing Picture in a Reorganized School District

	K-6 CURRENTLY IN THE 2012-2013 SCHOOL YEAR		<i>Roadmap “Picture” in a Reorganized District</i>
	Madison	Stockbridge Valley	
	FTE	FTE	FTE
	12	12	
November 2012 Enrollment:	251	231	
	<i>(On average 20.9 pupils per class grades K-6. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.)</i>	<i>(On average 19.25 pupils per class grades K-6. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.)</i>	25
Estimated beginning enrollment of a Reorganized School District:	Madison Elementary K-5 Estimated Enrollment in Five Years: 256	Stockbridge Valley Elementary K-5 Estimated Enrollment in Five Years: 230	Total Est. K-6 Enrollment of 554 <i>(On average 22.2 pupils per class grades K-6. It does not take into account that there may be some special needs pupils served in a self-contained setting when appropriate instead of a grade level class section.)</i>
	Grade 6 at Madison Building Estimated Enrollment in Five Years: 68		

FINDINGS OF THE STUDY

**'WHAT IF' ROADMAP PICTURE PRE-K THROUGH TWELVE
INSTRUCTIONAL STAFF FTE SUMMARY BY BUILDING**

	Madison Building serving K-5 and 6-8	Stockbridge Building Serving K-5 and 9-12	Serving Pupils District- Wide	Total Estimated Roadmap Picture of a Reorganized School District	<i>Total Current 2012-2013 Instructional Staff in Madison and Stockbridge Valley Combined</i>	2012- 2013 Staff At Madison *shared through BOCES	2012- 2013 Staff At Stockbridge Valley *shared through BOCES
Grades K-6 section teachers	14	11		25	24	12	12
Pre-Kindergarten	2	2		4	3	1	2*
Special education specialist (ex. consulting teacher, special education, reading, math, ESL, ELA)			13	13	12.5	7	5.5
English	1.5 (estimate of 131 grades 7-8 pupils; average of 18 to 20 pupils per class section)	2.5+.5 (estimate of 286 grades 9-12 pupils; average of 24-25 pupils per class section)		4 plus .5 for college courses and advanced placement courses	4.8	2.3	2.5
Social Studies	1.5	2.5+.5		4 plus .5 for college courses and advanced placement courses	5	2	3
Math	1.5	2.5+.5		4 plus .5 for college courses and advanced placement courses	5	2	3
General Science Earth Science Biology(Living Environment) Chemistry Physics	Total 1.5	Total 3.5+.5		5 plus .5 for college courses and advanced placement courses	6	3	3
Foreign Language	.75	1.25		2	2.2	1.2	1
Health	.5	1		1.5	1.1	.5 *	.6
Art			3	3	2.5	1	1.5
General Music Vocal Music Instrumental Music			4	4	3.67	1.67	2
Technology/Engin eering/ Agriculture			4	4	4	2	2
Driver Education				+\$20,000 for summer school	(summer school)	0	(summer school)

FINDINGS OF THE STUDY

	Madison Building serving K-5 and 6-8	Stockbridge Building Serving K-5 and 9-12	Serving Pupils District- Wide	Total Estimated Roadmap Picture of a Reorganized School District	<i>Total Current 2012-2013 Instructional Staff in Madison and Stockbridge Valley Combined</i>	2012- 2013 Staff At Madison *shared through BOCES	2012- 2013 Staff At Stockbridge Valley *shared through BOCES
Home and Careers (Consumer Science)			1.50	1.50	<i>1.33</i>	.33	1
Business		1		1	<i>.8</i>	.3	.5
Physical Education			4.5	4.5	<i>3.9</i>	2	1.9
Social Worker			2	2	<i>2</i>	1	1*
Guidance Counselor	1	2		3	<i>2</i>	1	1
Speech			1.1	1.1	<i>1.1</i>	.6*	.5*
Occupational Therapist			.5	.5	<i>.5</i>	.4*	.1*
Physical Therapist			.25	.25	<i>.25</i>	.05*	.2*
Psychologist			1	1	<i>1</i>	.4*	.4*
Librarian	1	1		2	<i>2</i>	1	1
Nurse	1	1		2	<i>2</i>	1	1
TOTALS OF FULL TIME EQUIVALENTS				94.35	<i>90.65</i>		

Teacher Aides and Teacher Assistants District-wide:

The two school districts currently deploy 12 NYS certified Teacher Assistants. There are 3.5 civil service teacher aides currently in the two school districts.

What cannot be defined at this time is how many special needs pupils may require one-to-one assistance as part of their Individual Education Plans as defined by the Committee on Special Education in collaboration with the pupils' parents. It is recommended that the current 15.5 FTE Teacher Assistants and Teacher Aides be initially planned initially for the reorganized district.

STAFF SEGMENT	THE CURRENT PROGRAM STAFF COLLECTIVELY IN THE TWO DISTRICTS	ESTIMATED <i>WHAT IF</i> SCENARIO WITH A REORGANIZED SINGLE SCHOOL DISTRICT
	Full Time Equivalents	Full Time Equivalents
Teacher Assistants	12	12
Teacher Aides	3.5	3.5
Estimated Totals:	15.5	15.5

Supervisory/Administrative Resources:

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

FINDINGS OF THE STUDY

It requires that all evaluators must be trained and an appeals process must be locally developed between the district and the respective bargaining unit. These new Regulations have tight timelines and have placed considerable pressure on school districts to integrate them into their evaluations systems.

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

It has been reported after recent training sessions sponsored by the State Education Department, that the number of staff a single supervisor should evaluate in a given year is 12. This study initially targets a 1:30 ratio.

Buildings:	Estimated Enrollment of the Building	Building/Program Supervision	Estimated number of certified personnel in the building plus the nurse
Madison Elementary Pre-K-5 and 6-8	Pre-K: 36 full day or 72 half day K-5: 256 6-8: 199	K-8 Principal, and One person who is .5 administrator to help with K-8 administrative responsibilities, and is a .5 Director of Instruction K-12*	36.92 (APPR evaluation ratio about 1:25)
Stockbridge Elementary Pre-K-5 and 9-12	Pre-K: 36 full day or 72 half day K-5: 230 9-12: 286	Building Principal, and Assistant Building Principal (also serves as CSE chair)	60.43 (APPR evaluation ratio about 1:30)
		4	

District-wide Supervision/Administrative Resources:

Charted below are the suggested district-wide resources for supervision and administration for the reorganized school district. The profile provides the skill sets to diligently deploy a school district with about 971 students, over 150 instructional and support staff members, and a budget of about \$20,000,000.

	Primary Resource Function	Full Time Equivalent
Superintendent	Chief Executive Officer	1
Business Manager	Chief financial officer.	1
Director of Athletics, Physical Education and Recreation	Plans, coordinates, implements, and evaluates all interscholastic and intramural program elements for Pre-K through 12 and supervises all coaches and physical education instructors.	No Change; Continues to be a stipend position
Director of Building and Grounds	Ensures the maintenance and upkeep of all of the facility resources of the district.	1
Director of Transportation	Organizes and implements all transportation services of the district.	1
Director of Food Services	Organizes and implements all school lunch and breakfast services of the district.	BOCES service as currently in Stockbridge Valley
Estimated Total		4

FINDINGS OF THE STUDY

District-wide Secretarial Support; Business Office Support; Technology Support; School Lunch, Transportation, Building and Grounds Resources:

Secretarial Support:

It is suggested that each school building should have at least two secretaries. Administrators, supervisors, guidance counselors, psychologists, and social workers are provided secretarial services. There are nine secretaries currently in both districts. A suggested deployment of secretarial support is:

Location	Secretary FTE's Assigned
Madison Building	2
Stockbridge Building	2
District Office	2
Business Office	2
Total:	8

School Business Office Support Staff:

It is suggested that the business office requires at least a Business Manager, and three business office support staff (two of whom are secretaries or other related civil service title). The four FTE's achieve the following with the help of the BOCES Central Business Office Service.

- ✓ Role of Treasurer
- ✓ Payroll.
- ✓ Accounts payable.
- ✓ Accounting of employee benefits like health insurance; assistant treasurer, and internal auditor
- ✓ Purchasing agent

STAFF SEGMENT	THE CURRENT PROGRAM STAFF COLLECTIVELY IN THE TWO DISTRICTS	ESTIMATED <i>WHAT IF</i> SCENARIO WITH A REORGANIZED SINGLE SCHOOL DISTRICT
	Full Time Equivalents	Full Time Equivalents
Business Office Support	1	1
Estimated Totals:	1	1

Instructional Technology Support:

One technology person is employed currently by both districts. It is suggested that the one FTE resource continue. One of the responsibilities of the part time Director of K-12 Instruction is to develop the technology plan with the staff K-12.

Transportation, food service and buildings operation and maintenance:

- **SCHOOL LUNCH:** It is suggested that the school lunch programs as staffed continue for the newly reorganized school district. Within the first two years of the new school district it is suggested that the district review, analyze and study the delivery of school lunch services to identify ways, if any, that the service can be delivered more efficiently.

FINDINGS OF THE STUDY

- **TRANSPORTATION:** It is suggested that the school transportation programs as staffed continue for the newly reorganized school district. Within the first two years of the new school district it is suggested that the district review, analyze and study the delivery of transportation services to identify ways, if any, that the service can be delivered more efficiently.

- **BUILDINGS AND GROUNDS:** It is suggested that the school buildings and grounds operations and maintenance resources as staffed in each building continue for the newly reorganized school district. Within the first two years of the new school district it is suggested that the district review, analyze and study the delivery of building services to identify ways, if any, that the service can be delivered more efficiently. For example, such an analysis can identify how best the new district can use differentiated staffing to achieve expected standards in cleaning; planned and scheduled maintenance of systems and equipment; availability of on-staff skill sets for electricity, plumbing, painting, refrigeration, and heating, ventilating and air conditioning to efficiently and cost-effectively operate the buildings of the district.

What staff would the reorganized school district probably need?

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

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

STAFF SEGMENT	THE CURRENT PROGRAM STAFF COLLECTIVELY IN THE TWO DISTRICTS*	ESTIMATED <i>WHAT IF</i> SCENARIO WITH A REORGANIZED SINGLE SCHOOL DISTRICT*	Estimated Collective Budget Impact (+ or – FTE’s times the average current FTE cost in the two school districts)
	Full Time Equivalents	Full Time Equivalents	
Pre-K through grade 12 teachers (including counselors, librarians, social workers, and similar others):	90.65	94.35	+\$294,379
K-12 certified administrators and district civil service supervisors	11	8	-\$181,002
Teacher Assistants	12	12	
Teacher Aides	3.5	3.5	
Secretarial	9	8	-\$44,189
Business Office Support	1	1	
Technology Support	1	1	
Bus Drivers	18	18	
Bus Aides	1	1	
School Lunch Workers	5	5	
Operations and Maintenance	10	10	
Total:	162.15	161.85	+\$69,188

*Includes shared itinerant staff purchased from the BOCES

FINDINGS OF THE STUDY

What would be the plan for bus transportation?

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

Assumptions:

- ✓ All Pre-K through grade 5 pupils attend the elementary school within the original school district ‘attendance zone’. However, parents who wish to have their elementary children attend an elementary school of the newly reorganized school district that is **closer** to their home may request that attendance at their discretion.
- ✓ The goal is to reduce the current longest ride of a child on a bus which is 60 minutes.
- ✓ Smaller (less than 66 passenger) buses will probably be used to transport pupils who currently live at the most outer limits of the current school district geographic boundaries.
- ✓ All pupils receive bus transportation in the two districts currently. The assumption is that the same service is provided in a reorganized school district. The current practice of door-to-door and/or centralized pick up points is expected to continue contingent on pupil safety considerations and characteristics at specific locations.
- ✓ It is expected that the reorganized school district continues the current practice of helping families as well as they can with transportation to day care locations depending upon the number of available seats on specific bus routes.
- ✓ It is suggested that existing routes with existing drivers be provided for at least the first year (or longer) of the reorganized district. Starting for year 2, study if there can be some combining of routing where boundaries of the two attendance zones are very close and/or redevelopment of some routes will reduce time for pupils to be on a bus.
- ✓ It is a goal to ensure arrival and departure of Vocational Technical students at the BOCES center in Verona is closer to arrival and departure times of other students from other school districts thus maximizing the instructional time available at the Vocational Center for students.

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

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

Grades PreK-5	Madison Elementary	8:45 - 3:30	6 hours, 45 minutes
Grades 6-8	Middle School at the Madison Building	8:45 - 3:30	6 hours, 45 minutes
Grades PreK-5	Stockbridge Valley Elementary	8:45 - 3:30	6 hours, 45 minutes
Grades 9-12	High School at the Stockbridge Valley Building	7:45 - 2:30	6 hours, 45 minutes

FINDINGS OF THE STUDY

The instructional day schedules currently in both districts are:

	Madison	Stockbridge Valley
Grades preK-6	8:10 – 2:58 (6 hours, 48 minutes)	8:05 – 2:34 (6 hours, 29 minutes)
Grades 7-12	8:10 – 2:58 (6 hours, 48 minutes)	8:05 – 2:34 (6 hours, 29 minutes)
Total number of bus runs currently:	10 in the A.M. 10 in the P.M.	11 in the A.M. 11 in the P.M.
Teacher Day currently begins:	7:40	8:00
Length of Teacher Day:	7 hours and 20 minutes	7 hours and 16 minutes

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

MORNING BEFORE SCHOOL DAY

	Madison Attendance Zone	Est. Number of Routes/buses	Stockbridge Valley Attendance Zone	Est. Number of Routes/buses
PreK-5	First pick-up 7:40	6 to Madison Elementary and Middle School at Madison	First pick-up 7:40	8 to Stockbridge Valley Elementary
Grades 6-8	First pick-up 7:40		First pick-up 7:40	5 --the same buses that transported the grades 9-12 from the Madison Attendance Zone to the High School at the Stockbridge Valley Building will transport to the Middle School at Madison
Grades 9-12	First pick-up 6:40	5 to High School at Stockbridge Valley Building	First pick-up 6:40	8 to the High School at the Stockbridge Valley Building

AFTERNOON END OF SCHOOL DAY TO HOME

	Madison Attendance Zone	Est. Number of Routes/buses	Stockbridge Valley Attendance Zone	Est. Number of Routes/buses
PreK-5	Dismissal 3:30	6	Dismissal 3:30	8
Grades 6-8	Dismissal 3:30		Dismissal 3:30	5 --the same buses that transported the grades 9-12 from the High School at the Stockbridge Valley Building back home to the Madison attendance zone
Grades 9-12	Dismissal 2:30	5	Dismissal 2:30	8

“Late Bus”

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

	Expected number of ‘late bus’ routes:
Madison Attendance Area	6
Stockbridge Valley Attendance Area	8

FINDINGS OF THE STUDY

Currently, the combined bus fleets of both districts include:

	Buses in service daily:	Spare buses:
Madison	16	2
Stockbridge Valley	12	5

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

The preliminary transportation framework plan was crafted together with the transportation directors, the school business officials, and the superintendents of both districts.

Current Number of Bus Runs Collectively by the Two Districts:	Estimated Number of Bus Routes for Initial Planning by a Reorganized School District:
21 AM pickup 21 PM take home Equal 21 round trips	32 AM pickup 32 PM take home Equal 32 round trips
Estimated transportation cost basis:	
The following are the total costs per round trip bus route by each of the districts for 2012-2013:	
Madison	Stockbridge Valley
\$46,016	\$49,023
<p><i>Where the estimates come from: The total transportation budget NOT INCLUDING SPECIAL RUNS FOR SPECIAL NEEDS PUPILS, FIELD TRIPS, VOCATIONAL CENTER RUNS, ATHLETIC AND CO-CURRICULAR RUNS which can vary yearly based on student programs and needs; divide that resulting expenditure number by the number of roundtrip bus runs to and from school in 2012-2013.</i></p>	
<p>Average cost for per bus route run round trip plus 10% for inflation and the cost of fuel for budget planning for 2014-2015:</p>	
<p>Madison attendance area bus route roundtrip estimate: \$50,618 Stockbridge Valley attendance area bus route roundtrip estimate: \$53,925</p>	
Transportation State Aid:	
<p>Transportation aid from the State of New York equals 90% of all approved expenses. The transportation aid currently received by Madison CS is 89.91% and Stockbridge Valley receives 89.88% for all transportation expenses submitted for approval by the State. Therefore, the local taxpayer cost currently for each round trip bus run in Madison CS is \$4,643 and the local taxpayer cost currently for each round trip run in Stockbridge Valley is \$4,961.</p>	

FINDINGS OF THE STUDY

Estimated Cost to Achieve the Preliminary Transportation Framework Plan for bus transportation to and from school in a reorganized district made up of Madison CS and Stockbridge Valley CS (includes 10% inflation over 2012-2013):

Madison CS, without reorganization:		Stockbridge Valley, without reorganization:		Estimated Total Cost Both Districts Annually:	Estimated Transportation Aid Received in Total Annually: (Estimated State Aid % equals 89.88%)	Estimated Net Local Taxpayer Cost in Total Annually: (Estimated 10.12%)
10 round trips	\$50,618 each	11 round trips	\$53,925 each	\$1,099,355	\$988,252	\$111,103
1 late bus route per week	\$816	3 late bus routes per week	\$11,189	\$12,005	\$10,791	\$1,214
ESTIMATED TOTALS FOR 2014-2015:				\$1,111,360	\$999,043	\$112,317
Estimated Transportation 'to and from School' Expenditure in a Reorganized District Made up of Madison and Stockbridge Valley combined:						
				Estimated Total Cost Annually:	Estimated Transportation Aid Received Annually: (Estimated State Aid % equals 89.88%)	Estimated Net Local Taxpayer Cost Annually: (Estimated 10.12%)
11 round trips	\$50,618 each	21 round trips	\$53,925 each	\$1,689,223	\$1,518,274	\$170,949
Estimated 12 late bus routes for co-curricular Monday through Friday				\$55,546	\$49,925	\$5,621
ESTIMATED TOTALS:				\$1,744,769	\$1,568,198	\$176,571
Estimated net difference in cost of the transportation to and from school expenditure of the two districts separately and combined through reorganization:				+\$633,409	+\$569,155	+\$64,254

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

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

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

FINDINGS OF THE STUDY

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

1. Estimated first year EXPENDITURE budget of a newly organized school district in 2014-2015.

Assumption: The estimated first year budget and financial plan framework is based on the vision of the program elements for Pre-K through 12 in a reorganized school district developed with the insights and advice of the Joint Community Advisory Committee. This vision includes which buildings will host the various grade level configurations.

Assumption: Ensuring that all pupils have access to interscholastic activities and co-curricular opportunities at a level higher and more diverse than now available by the two districts separately is an important value and goal by the Joint Community Advisory Committee. This goal is reflected in the estimated first year expenditure budget with the inclusion of \$20,000 more financial resources for such opportunities beyond what was budgeted by the two districts separately in 2011-2012. Both districts together expended \$302,625 for interscholastic, co-curricular, music and drama program opportunities for pupils in 2011-2012.

Assumption: The organization of the two districts into one will allow other expenditure reductions not identified as *major elements* below. For example, currently there are two expenditures for the required services of a yearly external audit. In all likelihood the yearly external audit for the new district will cost less than what is now collectively spent by the two school districts separately. Simultaneously, the newly organized school district may have additional expenditures like the need for one or two more tubas because more pupils take advantage of a more comprehensive band program. Such flexibility of reducing existing planned expenditures to support reasonable and appropriate new expenditures should be acknowledged at this stage of studying a possible reorganization. At this point in the road toward formal consideration of reorganization by the communities, the expenditures, revenues and property tax implications are viewed with an accurate, but global view by the study.

Assumption: The Joint Community Advisory Committee suggested that the reorganized school district should include resources to provide learning enrichment activities for pupils in the form of a possible summer enrichment program for elementary students that might include reading instruction and/or activities like drama or music, or planned field trip experiences for pupils K-12. Therefore, the forecasted budget of a reorganized school district includes \$10,000 to achieve enrichment instructional activities.

FINDINGS OF THE STUDY

Profile of the major elements of the first year’s expenditure budget of the newly organized school district:

Total of the 2012-2013 voter approved school budgets of the two separate school districts.	\$18,874,210
Anticipated inflation between 2013-2014 and 2014-2015 of 3.5%.	+ 660,598
Anticipated total of the 2014-2015 budgets of both districts <u>without reorganizing</u>:	\$19,534,808
Program Elements Resulting from Reorganization:	
Estimated difference in the staffing budgets of 2011-2012 of the two school districts separately and with the estimated staffing budget of the reorganized district. The staffing levels are based on the program vision developed with the help of the Joint Community Advisory Committee.	+ 69,188
Increase in the co-curricular, music/drama, and interscholastic resources budgeted separately by the two districts in 2011-2012 which totaled \$302,625.	+ 20,000
Resource to implement enrichment programming for pupils	+ 10,000
Estimated added expenditure for transportation based on the grade level configurations of the program and the location of the various school buildings.	+ 633,409
Expenditures to address developing new labor contracts.	+ 75,000
Net estimated <u>expenditure budget</u> in 2014-2015 for the first year of the newly organized district:	\$20,342,405

2. Estimated first year REVENUE budget of a newly organized school district in 2014-2015:

Assumption: In 2012-2013 both school districts in total are expected to receive \$11,985,436 in State Aid. The financial blueprint conservatively assumes that school district state aid (not including property tax revenues) received by the reorganized district in 2014-2015 will equal 103% of what was received in 2012-2013 by both districts. It is estimated that baseline state aid revenues, *not including reorganization incentive aid and property taxes*, will total \$12,344,999 in 2014-2015 for the reorganized school district.

Assumption: The newly organized school district will receive \$1,705,987 in legislatively defined school district reorganization incentive aid in the first year of reorganization. The schedule of reorganization aid for the two districts reorganized into one as per current legislation and state policy over the next fourteen years is:

Year	Reorganization Aid <i>in Addition</i> to Regular State School Aid
1	\$1,705,987
2	\$1,705,987
3	\$1,705,987
4	\$1,705,987
5	\$1,705,987
6	\$1,535,388
7	\$1,364,790
8	\$1,194,191
9	\$1,023,592
10	\$852,994
11	\$682,395
12	\$511,796
13	\$341,197
14	\$170,599
15	\$0

FINDINGS OF THE STUDY

Assumption: The newly organized school district ‘from day one’ needs to identify a financial framework plan to help ensure financial sustainability and to deal with unknown economic variables of the future ‘without surprises’ as the reorganization incentive aid eventually declines to \$0 after fourteen years.

Assumption: The newly organized school district will receive in 2015-2016 an additional \$569,155 in transportation aid to support the preliminary transportation plan developed by the two districts. This aid is in addition to the reorganization incentive aid.

Assumption: The newly organized school district will receive the highest of the building aid percentages of the current two school districts on all facility debt incurred previously by each school district. Stockbridge has the highest building aid ratio of 95%. The Madison CS building aid ratio is 94.8%. Therefore, building aid for existing debt of Madison will receive state building aid at the 95% level. Please note that any new facility debt that the communities approve in the future for the newly organized district will receive at least 95% in building aid state support. Charted below are the existing long term bond borrowings for facility capital projects as of June 30, 2014 (principal and interest) of each of the two districts.

Fiscal Year Ending June 30,	Madison <i>(aid ratio of 94.8%)</i>	Stockbridge Valley <i>(aid ratio of 95%)</i>	Estimated Annual <u>Additional</u> Building Aid Revenue based on all debt receiving 95% state aid times the approved Aidable expenditure amount of the project by SED <i>(i.e. the bond percentage)</i>
2014	\$820,820	\$1,345,600	\$1,642
2015	\$802,844	\$1,350,750	\$1,606
2016	\$801,769	\$623,700	\$1,604
Thereafter total thru '24-'25	\$2,566,294	\$4,502,800	\$5,133
Total Capital Debt:	\$4,991,727	\$7,822,850	\$9,983
	\$12,814,577		

Profile of the major elements of the first year’s total revenue of a newly organized school district based on 2012-13 current law.

Total estimate of the 2014-2015 regular state aid revenues. (103% of the total received in 2012-2013.)	\$12,344,999
Estimated total revenue other than state aid and property taxes that is part of the 2012-2013 revenue budgets of both districts (Example: appropriated fund balance, windmill pilot payments, and transfers from appropriate reserves to pay expenditures related to a reserve like funds from the unemployment reserve.) There is a total of \$1,813,754 of such not-state aid property tax revenue applied to the 2012-2013 budget. Conservatively, it is assumed that 88% (or \$1,596,103) of such revenue will be available as revenue for the 2014-2015 budget of a reorganized school district.	+ \$1,596,103
Estimated new ‘regular’ transportation state aid on additional bus routing. *	+ \$569,155
Estimated annual additional building aid due to a common building aid ratio applied to all existing capital bond debt of the two individual school districts.	+ \$1,642
Estimated Restricted Reserve Cash from the two districts on June 30, 2014	+ \$3,500,000
Year 1 of the reorganization incentive aid	+ \$1,705,987
Net estimated revenues <u>not including property taxes</u> for the first year of the newly organized district in 2014-2015:	\$19,717,886

*Pupil Transportation is an expenditure driven state aid. It is paid by the state in the year following the expenditure. The reorganization incentive aid in year one only will supply the \$569,155 revenue for added

FINDINGS OF THE STUDY

estimated transportation expenditure. This is a prime example of how the incentive aid helps to enable the establishment of reorganized school districts.

3. A Suggested Financial Framework to Manage the Reorganization Incentive Aid Revenues of the Newly Organized District Over Fifteen Years.

Assumption: As of June 30, 2014 the two school districts have \$12,814,577 in debt for existing school facility community approved projects. It is prudent to pre-pay this debt as reorganization incentive aid funds may allow. In this way, the newly reorganized school district can reduce a known obligated future expenditure without using local property tax revenue. Therefore, the debt through 2027 is significantly reduced and the school district has ‘reserved future state building aid revenue’ as a resource for the community and the school district through 2027 and beyond.

For example, here is the pattern of the cash flow with regard to paying a long term capital debt and the state aid that comes to the district as a result of the payment of the state approved facility project borrowing.

In 2014, the total debt payments due by both districts as one is:	In 2014, the total State Building Aid received as a revenue is about:	Therefore in 2014, the local taxpayer cost to pay for the capital debt is about:
\$2,087,240	\$1,878,516	\$208,724

The financial roadmap suggested by the study includes the pre-payment of \$5,400,000 in *existing debt* using the special state aid for reorganizing into one school district.

KEY POINT: *When there is pre-payment of debt by a school district, the state aid on the originally approved debt still is paid by the State to the district in an amortized fashion through the original term of the borrowing. There is no advanced payment of aid even though there is an advanced payment of debt.*

Therefore, here is the estimated pattern of cash flow to the reorganized district with regard to pre-paying long term debt as described in the financial roadmap.

From 2017-2025, the total debt payments due by both districts as one is:	\$7,069,094
From 2014-2025, the reorganized district pre-pays long-term debt using revenue from the special reorganization aid totaling:	\$5,400,000
Therefore, the total amount of debt payments that must come out of the local budget from 2017-2025 is:	\$1,669,094
From 2017-2015, the total State Building Aid received on debt as a revenue is about:	\$6,362,185
However, because of the pre-payment of debt using the special reorganization aid, the local taxpayer cost to pay for the capital debt from 2017-2025 is about:	\$166,910
The net total amount of state aid on long term debt received by the district from 2017-2025 for which there is no corresponding debt payment necessary out of the annual school budgets equals about:	\$6,195,275
Estimated amount of cash available to the district from 2017-2025 because of pre-payment of long-term debt for which there is no corresponding necessary school budget expenditure:	\$6,195,275

FINDINGS OF THE STUDY

What could the \$6,195,275 generated from pre-paying the debt be used for from 2017-2025?

- ✓ **Revenue to lower the need for property taxes; and/or,**
- ✓ **Take the place of annual state aid to schools in case the state faces another fiscal crisis; and/or**
- ✓ **Help fund a capital project approved by the taxpayers; and/or,**
- ✓ **Fund student programming approved by the Board with the support of the community**

Assumption: Below is the recommendation of Mr. Patrick Powers, CPA of D’Arcangelo & Co. of the list of reserves the newly organized district should achieve at a minimum over the first three to five years of its existence as a new district. As of June 30, 2012 both districts combined had approved reserves of \$4,333,018 in designated restricted reserves. The financial blueprint recognizes the total amount in restricted reserves already approved by both Boards of Education in that those same funds become restricted reserves at the start up of the newly reorganized school district. It is conservatively estimated that at the end of June 30, 2014 the total of the restricted reserves of both districts will total \$3,500,000.

Reserves:	Suggested Amount:
Encumbrances (Purchase Orders still ‘open’)	\$500,000
Unemployment Insurance	\$400,000
Worker’s Compensation Liability	\$200,000
Employees Retirement Contributions	\$800,000
Tax Certiorari	\$200,000
Employee Benefit Accrued Liability Reserve	\$1,300,000
Capital Reserve (Voter approval required to establish and fund.)	\$1,500,000
Repair Reserve (Voter approval required to fund, public hearing to spend.)	\$100,000
Mandatory Reserve Fund	
Insurance	
Property Loss and Liability	\$100,000
Tax Reduction	
Estimated Minimum Total Restricted Reserves:	\$5,100,000
Unrestricted:	
Unreserved Undesignated Fund balance (subject to 4% of subsequent year’s budget.)	\$740,000
Estimated Total of all Reserves:	\$5,840,000

FINDINGS OF THE STUDY

Therefore an illustration of the suggested financial framework for the use of the reorganization incentive aid is charted below:

Year	Cash from 'closing the books' of the two school districts allocated to reserves of the newly organized school district	Total Annual Reorganization Incentive Aid	Incentive Aid Allocated to Reserves Planned by the Board and approved by the voters (example: Capital Reserve Account for long range facility upgrades)	Incentive Aid Allocated to Enable First Year Cost for a Pupil Transportation Plan	Incentive Aid Allocated to <u>Pay Down</u> the <u>Existing Building Bond Debt</u> of the two districts now the responsibility of the new district (Advanced Payment of Existing Debt)	Incentive Aid Allocated to: Retain and improve student program opportunities; and to, Reduce the tax levy and help stabilize property taxes
2014	\$3,500,000	\$1,705,987	\$136,832	\$569,155		\$1,000,000
2015		\$1,705,987	\$63,130		\$700,000	\$942,857
2016		\$1,705,987	\$120,273		\$700,000	\$885,714
2017		\$1,705,987	\$177,416		\$700,000	\$828,571
2018		\$1,705,987	\$234,559		\$700,000	\$771,428
2019		\$1,535,388	\$21,103		\$800,000	\$714,285
2020		\$1,364,790	\$107,648		\$600,000	\$657,142
2021		\$1,194,191	\$94,192		\$500,000	\$599,999
2022		\$1,023,592	\$80,736		\$400,000	\$542,856
2023		\$852,994	\$67,281		\$300,000	\$485,713
2024		\$682,395	\$253,825			\$428,570
2025		\$511,796	\$140,369			\$371,427
2026		\$341,197	\$26,913			\$314,284
2027		\$170,599	\$113,456			\$57,143
2028		\$0	\$0			\$0
TOTALS	\$3,500,000	\$16,206,877	\$1,637,733	\$569,155	\$5,400,000	\$8,599,989

SOME OPTIONS TO DEAL WITH THE ANNUAL REDUCTION OF STATE REORGANIZATION INCENTIVE AID OVER THE FOURTEEN YEARS

It is suggested that the newly organized school district begin planning immediately and then take action annually starting in year six to adjust its financial plan annually for the \$57,143 lower amount of incentive aid used to reduce the property tax. Four possible adjustments options are:

- Regular legislated state aid may increase thus allowing the \$57,143 that is budgeted less in reorganization incentive aid revenue to be 'made up' without influencing property taxes.

and/or/in combination with:

- Starting in year two, the newly organized school district may identify annually on-going efficiencies to deliver the program. Therefore, financial efficiencies identified through on-going due diligence are the prime factors in moderating the reliance on the incentive aid to deliver the program that decreases annually over 14 years.

and/or/in combination with:

- Annually increase the property tax revenue to take the place of the incentive aid. Based on the true values and equalization rates of 2011-2012, 'making up' the \$57,143 that is

FINDINGS OF THE STUDY

budgeted less annually starting in year 2 of the new district in reorganization incentive aid is estimated to be .22 cents a year per \$1000 of true (market value). For a home with a true value of \$100,000 in 2012-2013, the yearly amount is an estimated total of \$22.

and/or/in combination with:

- Allocate a portion of the state building aid revenue resulting from the pre-payment of long-term debt without negatively affecting the program budget or increasing the local tax levy 'to make-up for' the reduced schedule of annual reorganization incentive aid.

POTENTIAL IMPACT ON PROPERTY TAXES IN 2014-2015 IF A REORGANIZATION WAS APPROVED BY THE COMMUNITIES:

Following is a projected 2014-2015 tax levy for the reorganized school district based on the financial framework described. Please note that the calculations are based on current 2012-2013 property assessments and equalization rates that only the Towns and State Board of Equalization can affect. It is not known at this time what the 2013-2014 budgets of the two individual districts might be or what the 2013-2014 property tax levies and rates may be. The calculations are based on the official 2012-2013 school tax rates of the two individual school districts.

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

Estimated budget for the first year of a reorganized district in 2014-2015:	\$20,342,405
Total estimate of the 2014-2015 regular state aid revenues. (103% of the total received in 2012-2013.)	-\$12,344,999
Estimated total revenue other than state aid and property taxes that is part of the 2012-2013 revenue budgets of both districts (Example: appropriated fund balance, windmill pilot payments, and transfers from appropriate reserves to pay expenditures related to a reserve like funds from the unemployment reserve.) There is a total of \$1,813,754 of such non-state aid and non-property tax revenue applied to the 2012-2013 budget. Conservatively, it is assumed that 88% (or \$1,596,103) of such revenue will be available as revenue for the 2014-2015 budget of a reorganized school district.	- \$1,596,103
Estimated reorganization incentive aid applied to first year costs for transportation:	- \$569,155
Estimated annual additional building aid due to a common building aid ratio applied to all existing bond debt of the two individual school districts.	- \$1,642
Estimated reorganization incentive aid applied to property taxes:	- \$1,000,000
Estimated tax levy for the first year of a reorganized district in 2014-2015:	\$4,830,506

FINDINGS OF THE STUDY
Current School Year 2012-2013 Property Tax Shares and Rates

Town	Assessed Value Tax Levy 2012-2013	Assessed Value Apportionment 2012-2013	Equalization Rate	Full Value	School Tax Levy	Percent of Tax Levy	Tax Levy Dollars	2012-2013 Tax Rate
<u>Madison</u>								
Augusta	35,443,241	35,443,241	0.7050	50,274,101	2,910,668	35.357924%	1,029,151.78	29.04
Marshall	359,002	359,002	0.6500	552,311	2,910,668	0.388442%	11,306.26	31.49
Vernon	390,911	390,911	0.7500	521,215	2,910,668	0.366572%	10,669.69	27.29
Eaton	676,471	676,471	1.0000	676,471	2,910,668	0.475764%	13,847.91	20.47
Madison	76,072,723	76,072,723	0.8600	88,456,655	2,910,668	62.211828%	1,810,779.77	23.80
Stockbridge	1,705,481	1,705,481	1.0000	1,705,481	2,910,668	1.199470%	34,912.59	20.47
Total	114,647,829	114,647,829		142,186,234		100.000000%	2,910,668.00	
								20.47 Tax rate on \$1000 of Market Value
<u>Stockbridge Valley</u>								
Oneida	8,407,415	8,407,415	1.0000	8,407,415	2,164,355	7.135452%	154,436.51	18.37
Eaton	8,776,680	8,776,680	1.0000	8,776,680	2,164,355	7.448851%	161,219.58	18.37
Lincoln	7,322,067	7,322,067	1.0000	7,322,067	2,164,355	6.214307%	134,499.66	18.37
Smithfield	6,835,055	6,835,055	1.0000	6,835,055	2,164,355	5.800976%	125,553.71	18.37
Stockbridge	82,020,856	82,020,856	1.0000	82,020,856	2,164,355	69.611873%	1,506,648.05	18.37
Augusta	456,345	456,345	0.7050	647,298	2,164,355	0.549368%	11,890.27	26.06
Vernon	2,862,440	2,862,440	0.7500	3,816,587	2,164,355	3.239173%	70,107.20	24.49
Total	116,680,858	116,680,858		117,825,958		100.000000%	2,164,354.98	
								18.37 Tax rate on \$1000 of Market Value

If the 2013-2014 Property Tax Levy in Both Districts is Limited to a 2% Increase, then the Possible Tax Shares and Rates for the 2013-2014 School Year Might be:

Town	Assessed Value Tax Levy 2013-2014	Assessed Value Apportionment 2013-2014	Equalization Rate	Full Value	School Tax Levy	Percent of Tax Levy	Tax Levy Dollars	2013-2014 Tax Rate
<u>Madison</u>								
Augusta	35,443,241	35,443,241	0.7050	50,274,101	2,968,881	35.357924%	1,049,734.69	29.62
Marshall	359,002	359,002	0.6500	552,311	2,968,881	0.388442%	11,532.38	32.12
Vernon	390,911	390,911	0.7500	521,215	2,968,881	0.366572%	10,883.09	27.84
Eaton	676,471	676,471	1.0000	676,471	2,968,881	0.475764%	14,124.87	20.88
Madison	76,072,723	76,072,723	0.8600	88,456,655	2,968,881	62.211828%	1,846,995.14	24.28
Stockbridge	1,705,481	1,705,481	1.0000	1,705,481	2,968,881	1.199470%	35,610.84	20.88
Total	114,647,829	114,647,829		142,186,234		100.000000%	2,968,881.01	
								20.88 Tax rate on \$1000 of Market Value
<u>Stockbridge Valley</u>								
Oneida	8,407,415	8,407,415	1.0000	8,407,415	2,207,642	7.135452%	157,525.24	18.74
Eaton	8,776,680	8,776,680	1.0000	8,776,680	2,207,642	7.448851%	164,443.96	18.74
Lincoln	7,322,067	7,322,067	1.0000	7,322,067	2,207,642	6.214307%	137,189.65	18.74
Smithfield	6,835,055	6,835,055	1.0000	6,835,055	2,207,642	5.800976%	128,064.78	18.74
Stockbridge	82,020,856	82,020,856	1.0000	82,020,856	2,207,642	69.611873%	1,536,780.95	18.74
Augusta	456,345	456,345	0.7050	647,298	2,207,642	0.549368%	12,128.08	26.58
Vernon	2,862,440	2,862,440	0.7500	3,816,587	2,207,642	3.239173%	71,509.34	24.98
Total	116,680,858	116,680,858		117,825,958		100.000000%	2,207,642.00	
								18.74 Tax rate on \$1000 of Market Value

Two Budget Years from now Estimated "What If" 2014-2015 Property Tax Shares and Rates if the Two Districts Reorganized into One

Town	Assessed Value Tax Levy 2014-2015	Assessed Value Apportionment 2014-2015	Estimated Equalization Rate	Estimated Full Value	Estimated School Tax Levy	Estimated Percent of Tax Levy	Estimated Tax Levy Dollars	Estimated 2014-2015 Tax Rate
Augusta	35,899,586	35,899,586	0.7050	50,921,399	4,830,506	19.584235%	946,017.65	\$ 26.35
Marshall	359,002	359,002	0.6500	552,311	4,830,506	0.212417%	10,260.82	\$ 28.58
Vernon	3,253,351	3,253,351	0.7500	4,337,801	4,830,506	1.668307%	80,587.67	\$ 24.77
Eaton	9,453,151	9,453,151	1.0000	9,453,151	4,830,506	3.635657%	175,620.63	\$ 18.58
Madison	76,072,723	76,072,723	0.8600	88,456,655	4,830,506	34.020195%	1,643,347.56	\$ 21.60
Stockbridge	83,726,337	83,726,337	1.0000	83,726,337	4,830,506	32.200927%	1,555,467.71	\$ 18.58
Oneida	8,407,415	8,407,415	1.0000	8,407,415	4,830,506	3.233470%	156,192.96	\$ 18.58
Lincoln	7,322,067	7,322,067	1.0000	7,322,067	4,830,506	2.816048%	136,029.37	\$ 18.58
Smithfield	6,835,055	6,835,055	1.0000	6,835,055	4,830,506	2.628744%	126,981.64	\$ 18.58
Total	231,328,687	231,328,687		260,012,191		100.000000%	\$ 4,830,506.00	
								18.58 Tax rate on \$1000 of Market Value

FINDINGS OF THE STUDY

Sample property taxes for a home with a \$100,000 market (true value). *True value* equals the locally assessed value of a parcel divided by the equalization rate as determined yearly by the NYS Office of Real Property:

CURRENT TAX YEAR 2012-2013

Current Tax Year EXAMPLE FOR THE 2012-2013 SCHOOL YEAR					
School District	Town	Example True Value	Corresponding Assessed Value	2012-2013 Tax Rate Per \$1000 Assessed Value	2012-2013 Property Taxes
Madison	Augusta	\$100,000	\$70,500	\$29.04	\$2047
	Marshall	\$100,000	\$65,000	\$31.49	\$2047
	Vernon	\$100,000	\$75,000	\$27.29	\$2047
	Eaton	\$100,000	\$100,000	\$20.47	\$2047
	Madison	\$100,000	\$86,000	\$23.80	\$2047
	Stockbridge	\$100,000	\$100,000	\$20.47	\$2047
	Stockbridge Valley				
	Oneida	\$100,000	\$100,000	\$18.37	\$1837
	Eaton	\$100,000	\$100,000	\$18.37	\$1837
	Lincoln	\$100,000	\$100,000	\$18.37	\$1837
	Smithfield	\$100,000	\$100,000	\$18.37	\$1837
	Stockbridge	\$100,000	\$100,000	\$18.37	\$1837
	Augusta	\$100,000	\$70,500	\$26.06	\$1837
	Vernon	\$100,000	\$75,000	\$24.49	\$1837

ESTIMATED NEXT SCHOOL YEAR 2013-2014

ESTIMATED Tax Year EXAMPLE FOR THE 2013-2014 SCHOOL YEAR ASSUMING THE TAX LEVY INCREASE FROM THE PREVIOUS SCHOOL YEAR 2012-2013 IS LIMITED TO A 2% INCREASE IN BOTH SEPARATE SCHOOL DISTRICTS					
School District	Town	Example True Value	Corresponding Assessed Value	2013-2014 Tax Rate Per \$1000 Assessed Value	2013-2014 Property Taxes
Madison	Augusta	\$100,000	\$70,500	\$29.62	\$2088
	Marshall	\$100,000	\$65,000	\$32.12	\$2088
	Vernon	\$100,000	\$75,000	\$27.84	\$2088
	Eaton	\$100,000	\$100,000	\$20.88	\$2088
	Madison	\$100,000	\$86,000	\$24.28	\$2088
	Stockbridge	\$100,000	\$100,000	\$20.88	\$2088
	Stockbridge Valley				
	Oneida	\$100,000	\$100,000	\$18.74	\$1874
	Eaton	\$100,000	\$100,000	\$18.74	\$1874
	Lincoln	\$100,000	\$100,000	\$18.74	\$1874
	Smithfield	\$100,000	\$100,000	\$18.74	\$1874
	Stockbridge	\$100,000	\$100,000	\$18.74	\$1874
	Augusta	\$100,000	\$70,500	\$26.58	\$1874
	Vernon	\$100,000	\$75,000	\$24.98	\$1874

FINDINGS OF THE STUDY

**N. ESTIMATED YEAR ONE OF REORGANIZATION: TWO BUDGET YEARS FROM NOW
ESTIMATED PROPERTY TAXES FOR THE 2014-2015 SCHOOL YEAR**

IF THE TWO SCHOOL DISTRICTS REORGANIZED INTO ONE SCHOOL DISTRICT:

Reorganized School District	Town	Example True Value of a home	Corresponding Assessed Value	2014-2015 Tax Rate Per \$1000 Assessed Value based on the tax levy reflective of the outlined financial plan for the newly organized school district for 2014-2015	2014-2015 Estimated Property Taxes on a \$100,000 market value ('true value') home
	Augusta	\$100,000	\$70,500	\$ 26.35	\$1858
	Marshall	\$100,000	\$65,000	\$ 28.58	\$1858
	Vernon	\$100,000	\$75,000	\$ 24.77	\$1858
	Eaton	\$100,000	\$100,000	\$ 18.58	\$1858
	Madison	\$100,000	\$86,000	\$ 21.60	\$1858
	Stockbridge	\$100,000	\$100,000	\$ 18.58	\$1858
	Oneida	\$100,000	\$100,000	\$ 18.58	\$1858
	Lincoln	\$100,000	\$100,000	\$ 18.58	\$1858
	Smithfield	\$100,000	\$100,000	\$ 18.58	\$1858

Summary estimated impact on property taxes if a reorganization is approved:

- ✓ A property owner with a \$100,000 home in Madison can expect a property school tax bill of about \$230 less in 2014-2015 compared to 2013-2014 given the assumptions outlined above.
- ✓ The Stockbridge Valley owner of a \$100,000 home can expect a property school tax bill of about \$16 less in 2014-2015 compared to 2013-2014 given the assumptions outlined above.

Summary estimated additional instructional opportunities if a reorganization is approved:

- Two additional half-day classes to serve pre-kindergarten children
- An additional one-half teacher to address such instruction as reading, remedial math
- Additional budget of \$20,000 to ensure that all age qualified pupils in grades 9-12 can take driver education in the summer
- .4 additional Health Teacher to serve pupils in grades 6-8 as opposed to waiting until high school
- One-half additional art teacher K-12
- One-third additional music teacher K-12
- .5 English teacher to offer college and advanced placement courses for the High School
- .5 Social Studies teacher to offer college and advanced placement courses for the High School
- .5 Math teacher to offer college and advanced placement courses for the High School
- .5 Science teacher to offer college and advanced placement courses for the High School
- One-fifth additional home and careers teacher to be able to serve pupils beginning in grade 6
- One-fifth additional business teacher to offer more courses to the high school curriculum
- Two-thirds of a physical education teacher to help ensure that all elementary pupils receive the required time for physical education
- One additional guidance counselor to provide counseling services to grades K-6
- One additional grades K-6 teacher in case the high range enrollment projection comes about
- \$20,000 additional to increase interscholastic, music/drama, and extracurricular opportunities for K-12
- \$10,000 additional budget to provide enrichment learning opportunities for K-12 pupils during the school year and during the summer
- Late buses for grades 4-12 Monday through Friday to enable participation in co-curricular activities and extra help programs.

FINDINGS OF THE STUDY

The New York State Property Levy Tax Limit Legislation:

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

This “property tax levy limit” is determined by each school district according to an eight-step complex formula outlined in the law. During the budget preparation process for the 2012-2013 proposed operating budget, each separate district calculated that “limit” and that percentage varied by district. School districts have the option to exceed their 'tax levy limit” with at least 60% voter approval.

This new law first affected the 2012-13 tax levies. Since school districts are currently operating under this new legislation and no reorganized district has been affected by it as of this writing, the full impact of this newly-enacted Property Tax Levy Limit may not be known. Any long-range financial planning (including expenditures, revenues and fund balance) will be influenced by it.

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

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

The Study Team recommends that before the districts go to a statutory referendum in pursuit of reorganization, specific information should be received from the State Education Department to determine how the above law will pertain to the two districts of this study. It is important to note that this is not only relevant in Year One of the newly organized district, but also in subsequent years.

What would the new school district need to do to prepare for the school year in ‘September 2014’?

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

If the two district communities affirm a centralization of the two districts by statutory referendum, the reorganized district faces a series of transition decisions that should be addressed prior to formal establishment of the centralized district on July 1, 2014 and others that need to be addressed by September 2014. In addition there are transition issues that will need decisions in the first one to two years of the new school district.

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

FINDINGS OF THE STUDY

The reorganized school district would be operating concurrently with the two original school districts for a period of time. Each district has its own activities, instructional calendar, assessment program and the like to conduct while the same people will be planning for a new school district to take affect July 1, 2014. Establishing a viable transition team and plan is critical to the smooth and successful implementation of a newly-reorganized district. Implementing a transition plan will require the cooperation and collegiality of all aspects of the school and communities of each district. The major transition decisions (in no priority order) include, but are not limited to:

By July 1, 2014:

- ✓ Select and appoint a superintendent of schools
- ✓ Develop and prepare a 2014-15 school district budget for voter consideration
- ✓ Approve a 2014-15 school district calendar
- ✓ Determine 'common name' if appropriate and desired by the district and file appropriate paperwork with SED

By September 1, 2014:

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

Within the first 12 to 24 months:

- ✓ Recognize bargaining units; begin to develop labor contracts with the various bargaining groups
- ✓ Commence a long-range facilities plan
- ✓ Review and establish Board Policies
- ✓ Study and review the school lunch, operations and maintenance, and transportation programs.

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

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

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

FINDINGS OF THE STUDY

- **Governance – Board of Education Seats**

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

- **Name of the New District**

Sections 315 and 1801 (2) of Education Law refer to the naming of a centralized district. They specify that each school district shall have a legal name consisting of a geographic designation. Boards of education may petition the Commissioner of Education to adopt a simplified name for the reorganized school district. The final ‘name’ should be applied for by mid-June, 2014.

- **School Colors and School Mascot**

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

The Board of Education has the final legal authority for approval. However, this real life experience for the new student body to come together to both create and carry out a democratic process to select those aspects of the reorganized district that affect them most can be a valuable learning opportunity. The recommendation for school colors and mascot would be the initial accomplishment of a new student body which will help in creating a new school culture. The process should be completed before commencement in June of 2014 while all students are still in attendance. Therefore, this issue should be addressed early in the transition process by the students and the Transition committee.

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

FINDINGS OF THE STUDY

P. Feasibility Study Question Summary

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

The purpose of the feasibility study is to gather information and provide facts and recommendations to the Boards of Education of the Districts regarding the potential reorganization of one or both districts.

Options to be considered through the study may include centralization, annexation, formal or informal sharing and cooperation agreements between the districts, any other changes that may be authorized by current law or amendments to the law, and no change from the current status.

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

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

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

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

The Feasibility Study contains original text, concepts and formats crafted by the SES Study Team, LLC.

SES STUDY TEAM

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



Dr. Paul M. Seversky



Mr. Doug A. Exley



Mr. Sam A. Shevat

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

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

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

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

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

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

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