

**Annexation Study Final Report**  
**Schenevus and Worcester**  
**Central School Districts**

*Prepared by*

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We also owe a large debt of gratitude to the members of the study advisory committee listed below. These individuals devoted considerable time and effort to assist us with this important work. They are to be commended for the commitment they have shown to their respective communities:

Schenevus Committee Members

Jennifer Andrews  
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Andy Odell

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Sincere gratitude is also offered to State Senator James Seward who secured a financial grant to underwrite the cost of this study. Without this financial support, this study would not have been possible.



# **Chapter 1**

## **Background**

A number of factors are affecting the operation of public school districts in New York State today. State standards continue to rise requiring students to do more in order to attain a high school diploma. These standards are driven by a rapidly changing world where more skills than ever before are required in order for students to be successful in college, the world of work, or both. Pressures on schools to increase the number of students who successfully complete high school continue to mount.

At the same time that schools are requiring more of their students, the number of students attending New York State schools is declining. Other than a few isolated sections of the state, most school district enrollments have declined in the past few years and are projected to continue to decline in the foreseeable future. It is a challenge for schools to do more with fewer students, especially in the face of the COVID pandemic.

Another challenge facing school districts in New York State is one of resources. As districts strive to provide more for their students, financial challenges remain. Many districts struggle to find adequate resources to support the educational programs without placing increasingly greater burdens on taxpayers in difficult economic circumstances. It is clearly time for courageous school leaders to begin discussions about doing business differently.

In the spring of 2019, the Schenevus and Worcester boards of education expressed interest in discussing a study to examine the possible merger of the Schenevus and Worcester school districts. In July 2019, Alan Pole made a presentation on merger to the two boards of education and answered the questions they had at that time. Subsequent discussions between the two districts ensued and in January 2020, Alan Pole and Deb Ayers made another presentation on mergers to the boards of education and the two communities. In February 2020, both boards of education passed resolutions supporting a merger study. The format for the merger study is an annexation whereby Worcester would be annexing Schenevus should the merger be approved.

The districts selected Castallo and Silky LLC, Education Consultants from Syracuse, to complete this annexation study. Castallo and Silky LLC has conducted more



than 25 school district merger studies prior to this investigation. In March 2020, each board of education identified members of its respective school community to form an advisory committee. The purpose of the advisory committee was to offer assistance to the consultants as they went about their work and to serve as key communicators back to their school district communities. Additionally, as an annexation study, the two Boards of Education crafted and agreed to a set of shared values to guide the annexation study in the event a merger were to occur. These shared values are listed below. It is important to note that these shared values are not legally binding should the annexation occur.

**Statement of Shared Values**

**Worcester and Schenevus Collaboration**

*Demonstrating and highlighting the value that each school and community brings to an enlarged school district collaboration is extremely important. In any positive and productive relationship, feeling valued provides the means to develop a strong foundation. The statement of values is meant to highlight what can be achieved together. As the community learns about the shared values and effort each school board is undertaking to support students, it is hoped that they would support the merger. As such, we attest to our collective efforts to develop and maintain our shared values through partnership to support our students and communities. The Statement of Shared Values below provides a means to accomplish this goal.*

1. *To demonstrate the value and importance of encouraging collective school governance among all stakeholders of the enlarged school district, increase Board of Education membership from 5 to 7 members. It is understood that this will be a means to encourage broad-based participation, but cannot guarantee the same. Upon a successful annexation vote, the Worcester Board of Education will initiate a vote to request an increase in the size of the BOE from 5 to 7 members. Should this be successful and as soon as practicable, a special election will be held to seat the additional BOE members.*
  
2. *As we value a 21<sup>st</sup> century education for our students, a successful merger vote will provide resources to enhance student learning opportunities. A merger will also provide an opportunity to realize efficiencies. Therefore, in an effort to accomplish each of these outcomes, the BOE will discuss and determine the most appropriate way to maximize the additional merger aid to:*
  - a. *expand and enhance the academic program and educational opportunities offered to students;*
  - b. *assess the means to aid taxpayers;*
  - c. *provide funds to a reserve to address unforeseen issues that may arise, as well as maintaining the initiatives stated above.*



3. *The BOE understands the value to keep both school buildings open. It is understood that the Schenevus school building will be needed for educational programming in the foreseeable future. Therefore, provide the means for the Schenevus school and community to name the Schenevus school building to reflect the role it will play in educating students.*
4. *All employees are valued. As such, the BOE will discuss the means to provide employment for as many staff members as possible. Strategies, such as utilizing retirements and attrition will be used to accomplish this goal.*

The study began in earnest in April 2020 with an initial meeting of the advisory committee. This report represents the culmination of our work and offers an overview of each district in the essential areas of operation when a merger is being considered: enrollment and enrollment projections, program (academic and extra-curricular), facilities, transportation, staffing, and finances. This report also contains our recommendations for consideration should residents of both the Schenevus and Worcester Central School Districts approve this annexation.

As a framework for completing this study, the following critical questions were regularly discussed with the advisory committee:

***Program and Enrollment***

- What are the enrollment historical patterns and projections for each district and how might these projections affect future program offerings?
- What programs does each district offer the other if they were to merge today?
- What new academic and extracurricular programs might be offered?
- How would merger affect class size?
- How would program-offering decisions be made?
- What effect would merger have on vocational programs, both on-site and presently offered at the BOCES?
- What effect would merger have on special education programs, both on-site and those offered through other organizations?

***Facilities and Transportation***

- What should be the configuration of the facilities by grade level?
- What is the status of the existing physical facilities?



- What immediate and longer term needs will have to be addressed and what are the cost implications for these needs if existing buildings remain in use?
- What other facilities options should be considered and what are the implications (cost, travel, space, etc.) for each?
- What is the longest bus run (distance/time) for a student in each district today?
- If existing facilities were used, how long would it take to reach each one?
- Would additional bus runs be feasible to cut down on travel time?
- Would one or two bus facilities be recommended?
- What would be the advantages/disadvantages to combining the transportation fleet, staff, inventory, or purchasing?

### ***Staffing***

- What might happen with disparate pay scales?
- What major provisions exist in present contracts and how do they compare? Are there significant language differences in contracts?
- Should provisions be recommended for continuation of present probationary and/or tenured staff for a period of time?
- How should assignments be made in a new district for administrators, teachers, support staff, coaches, and extracurricular advisors?
- What might be the administrative structure in a merged district?

### ***Finance***

- How have taxes varied in each district over the past five years?
- What proportion of additional State Aid should be directed to program improvement, tax reduction, long term fiscal stability, or facilities?
- What are the financial assets of each district?
- What are the financial liabilities of each district?
- How much Incentive Operating Aid should the new district expect to receive?
- What would be the maximum approved Building Aid the new district would receive?
- What considerations should be placed in the financial plan to assure the new district will see long-term benefits from additional Aid?
- What would be the impact on property taxes should the districts decide to merge?



In conducting this study, we examined data from the 2018-19, 2019-20 and, in some cases, the 2020-21 school years. The study took a “snapshot” of the conditions that existed in Schenevus and Worcester at these points in time. This report is written with a clear understanding that things will change. As school leaders look to the future, they can use this study as a starting point but will have to adjust as a result of economic conditions and increased demands from the state. Table 1.1 that follows provides preliminary data about the two districts.

<b>Table 1.1 Background Information on the Study Districts</b>		
	Schenevus	Worcester
Board of Education	Stacie Haynes, President Liz Reed, Vice President Dr. Jay Deitchman Tom Snyder Tim Walke	William Fisher, President Michelle Francis, Vice President Stacey Serdy Tanya Shalor Peter Kwiatkowski
Superintendent	Theresa Carlin	Tim Gonzales
2019-20 Enrollment	339*	332*
Area of District	75 square miles	61 square miles
BOCES	Otsego Northern Catskills	Otsego Northern Catskills
Transportation Aid Ratio**	.900	.900
BOCES Aid Ratio**	.705	.702
Building Aid Ratio**	.804	.808
Combined Wealth Ratio**	.510	.539
True Value Tax Rate 2019-20	\$17.91	\$18.76
Grade Level Configurations	Pre-K-12	Pre-K-12
Economically Disadvantaged***	56%	58%
White***	93%	97%
Hispanic or Latino***	3%	2%
Black or African American***	2%	1%
Multi-Racial***	2%	0%
NOTE: *Enrollment numbers include non-graded students and Pre-Kindergarten students. **Data obtained from 2019-20 State Aid output reports from SED. ***2018-19 data from SED.		

Upon its completion, the merger study will be reviewed by the State Education Department. Following SED review of the report, presentations on the study will be made to a joint session of the two boards of education. Ample opportunity for questions and answers will be provided to the boards and their staff. It is anticipated that each board of education will take time to deliberate about this report and then make its decision about how to proceed in a manner that will best serve their districts.



This merger study has been about the annexation of Schenevus by Worcester. In an annexation, one school district (Schenevus) is dissolved and absorbed by the other district (Worcester). Should the Schenevus and Worcester boards of education decide to move forward, an advisory referendum or “straw vote” is taken in both school district communities. If a majority of the voters in both communities approve the straw vote, the Commissioner of Education will then formally lay out the merged school district and call for a formal referendum. At this same public referendum, the public could also vote on whether to enlarge the existing Worcester Board from its present five members to perhaps 7 or 9 members. This could result in current Schenevus residents petitioning to run for the Worcester Board; however, election districts are not allowed in central school districts in New York.

Should the voters from both school districts approve the merger in the public referendum, the merger of the two school districts is approved. However, if the merger vote does not receive majority voter approval in each district, the merger vote fails and the two school districts remain in their current status. After a year and a day, a second vote on reorganization may be held. If the first vote failed in only one of the districts, it is only that district that would hold a second vote with the positive vote from the other district remaining valid.

Worcester would inherit all of the Schenevus property as well as the contractual obligations that existed prior to the merger. The Worcester Superintendent would continue as the superintendent of the new school district. The BOCES District Superintendent can serve as a valuable resource for the board of education in the merger process.

Newly merged school districts come into formal operation on July 1 of a given year. The consultants are quite confident that, should a merger take place, the steps outlined above can be accomplished for a new school district to be formed by July 1, 2022.



## **Chapter 2**

# **Enrollment History and Projections**

Accurate student enrollment projections are essential for district long range planning. Virtually all aspects of a school district’s operation, including program, staffing, facilities, and finances, are related to the number of students enrolled. For this reason, updated enrollment projections are critical and serve as the first aspect of analysis for this study.

The procedure for projecting student enrollments is referred to as the Cohort Survival Method. This methodology is highly reliable and is the most frequently used projective technique for making short-term school enrollment projections. To calculate enrollment projections, the following data and procedures are used:

- Six years of district enrollment by grade level
- Calculation of survival ratios by grade level
- Kindergarten enrollment projections based on resident live births

A survival ratio is obtained by dividing a given grade’s enrollment by the enrollment of the preceding grade a year earlier. For example, the number of students in grade three in any year is divided by the number of students in grade two of the previous year. The ratio indicates the proportion of the cohort “surviving” to the following year. Cohort refers to the enrollment in a grade for a given year.

Using grade-to-grade survival ratios, an average of these ratios for each cohort progression is obtained. This average is referred to as an average projective survival ratio. This ratio is then multiplied by each current grade enrollment to obtain the projected enrollment for the next successive year. The multiplicative process is continued for each successive year.

Survival ratios usually have values close to one but may be less than or greater than one. Where the survival ratio is less than one, fewer students “survived” to the next grade. Where the survival ratio is more than one, more students “survived” to the next grade. Grade-to-grade survival ratios reflect the net effects of deaths, dropouts, the number of students who are home schooled, promotion policies, transfers to and from nonpublic schools, and migration patterns in and out of the school district.



Since estimating births introduces a possible source of error into the model, enrollment projections are most accurate when existing data on live residential births can be used. Live birth data is currently available from the New York State Department of Health for both school districts from 2009 through 2017. Enrollment projections are therefore most accurate for three to five years into the future for the elementary grades.

The methodology used in this study was an extrapolation of kindergarten enrollment cohorts from live birth data from the two school districts. Live birth data for Schenevus and Worcester from 2009 to 2017 is shown in the following table.

<b>Table 2.1</b>			
<b>Number of Live Births, 2009 – 2017</b>			
Calendar Year	Schenevus	Worcester	Total
2009	16	21	37
2010	26	18	44
2011	22	29	51
2012	23	17	40
2013	19	20	39
2014	20	21	41
2015	26	18	44
2016	23	23	46
2017	23	26	49

Comparing the number of live births in any year with the number of students entering kindergarten five years later will produce a ratio. This ratio of live births to entering kindergarten students is the factor that is used to project kindergarten enrollments from live births into the future. Combining the kindergarten enrollment projections with the cohort survival ratios for each grade level, the K-12 enrollments for Schenevus and Worcester can now be projected through the 2026-27 school year. Tables 2.2 and 2.3 on the following pages present the projected enrollments for both of the study districts.



	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
Live Birth Data for incoming Kindergarten class	16	26	22	23	19	20	26	23	23	22	22	22	22
Grade K	27	29	31	25	27	16	25	32	28	28	27	27	27
Grade 1	26	27	28	26	20	29	15	23	30	26	26	26	25
Grade 2	31	26	28	28	24	16	28	14	22	28	25	25	24
Grade 3	25	29	23	27	27	20	15	25	13	20	26	23	23
Grade 4	27	23	32	24	24	28	20	15	25	13	20	26	23
Grade 5	24	26	27	34	22	27	29	21	15	26	14	21	27
Grade 6	30	25	27	28	34	20	27	30	21	15	27	14	21
Grade 7	33	32	27	28	23	34	20	27	30	21	15	27	14
Grade 8	20	28	32	26	26	24	33	19	26	28	20	15	25
Grade 9	25	21	29	31	27	23	24	32	19	26	28	20	15
Grade 10	31	25	19	29	30	28	23	23	32	19	25	28	20
Grade 11	24	30	27	17	31	30	28	23	24	32	19	25	28
Grade 12	20	24	32	29	19	28	31	29	23	24	33	19	26
Total Grades K-12	343	345	362	352	334	323	316	313	308	308	306	296	299
Total Grades K-6	190	185	196	192	178	156	158	160	155	158	165	162	171
Total Grades 7-12	153	160	166	160	156	167	158	154	153	150	141	134	128

NOTE: From 2023-24 to 2026-27 live births are the average of the previous five years. Consequently, from 2023-24 to 2026-27 the early grade enrollments are quite speculative.



<b>Table 2.3 Worcester Enrollment History and Projections</b>													
	2014 -15	2015 -16	2016 -17	2017 -18	2018 -19	2019 -20	2020 -21	2021 -22	2022 -23	2023 -24	2024 -25	2025 -26	2026 -27
Live Birth Data for incoming Kindergarten class	21	18	29	17	20	21	18	23	26	22	22	22	22
Grade K	22	17	26	23	16	26	22	19	24	27	22	22	22
Grade 1	27	25	18	28	25	14	27	23	19	25	28	23	23
Grade 2	25	24	24	18	32	23	14	27	22	19	24	28	23
Grade 3	28	29	28	25	20	29	25	15	29	24	21	26	30
Grade 4	24	26	30	31	25	19	29	25	15	29	24	21	26
Grade 5	27	24	26	32	29	24	19	29	25	15	29	24	20
Grade 6	21	25	24	23	33	29	23	18	28	24	14	28	23
Grade 7	25	23	28	22	25	34	30	24	19	29	25	15	29
Grade 8	29	23	25	30	22	25	35	31	25	19	30	25	15
Grade 9	29	31	24	24	28	23	25	35	31	25	20	30	26
Grade 10	26	24	29	22	22	28	21	23	32	29	23	18	28
Grade 11	27	24	26	30	21	20	27	21	23	31	28	23	18
Grade 12	32	25	24	24	29	23	20	27	20	22	31	28	22
Total Grades K-12	342	320	332	332	327	317	317	316	312	319	319	311	306
Total Grades K-6	174	170	176	180	180	164	159	155	162	162	162	172	168
Total Grades 7-12	168	150	156	152	147	153	158	161	150	156	157	139	138

NOTE: From 2023-24 to 2026-27 live births are the average of the previous five years. Consequently, from 2023-24 to 2026-27 the early grade enrollments are quite speculative.

Beginning in 2014-15, the K-12 student enrollment in Schenevus increased through the 2016-17 school year but has declined since that time. The overall decline from 2014-15 to 2019-20 is -5.8%. The K-12 enrollment in Worcester has fluctuated since 2014-15 but there has been an overall decrease from 2014-15 to 2019-20 of 255



students or -7.3%. It is important to note that percentages can be deceiving when applied to small numbers. The enrollment decline equates to 20 students (343 to 323) in Schenevus and 25 students (342 to 317) in Worcester. This pattern of decline is generally the norm for upstate New York school districts. The elementary (K-6) enrollments in both districts have declined during this time period; Schenevus by -17.9% (190 to 156) and Worcester by -5.7% (174 to 164). The secondary (7-12) enrollment increased in Schenevus (153 to 167; +9.2%) while decreasing in Worcester (168 to 153; -8.9%). Enrollment projections for both districts indicate that the K-12 student enrollment will continue to decrease slightly. Schenevus is expected to experience a further enrollment decline from 323 students in 2019-20 to 299 students in 2026-27 (24 students, -7.4%). K-12 student enrollment in Worcester is projected to decrease slightly from 317 in 2019-20 to 306 in 2026-27 (11 students, -3.5%). It should be noted that both districts are projected to see the elementary enrollment increase from 2019-20 to 2026-27 with more significant decreases in secondary student enrollment.

Should the districts decide to merge, Table 2.4 shows the projected enrollment of the merged district. The projected enrollment of a merged district would be 634 in 2020-21 and would likely decline by 29 students (-4.6%) through 2026-27.

<b>Table 2.4 Combined Enrollment Projections 2020-21 to 2026-27</b>							
	Year						
	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
K-12 Total	634	629	621	627	625	607	605
K-6	317	314	317	321	328	334	340
7-12	317	315	304	306	297	273	265

Some families have chosen to educate their children at home. Some school districts have a large number of these “home-schooled children” and, should these families all decide to discontinue this practice, it could possibly place a strain on the district of residence to welcome them into the public schools. Consequently, it is important to examine the number of these home-schooled students in each of the study



districts. Table 2.5 provides a summary of the home-schooled students in both the Schenevus and Worcester Central School Districts.

<b>Table 2.5 Number of Home Schooled Students from 2015-16 to 2019-20</b>		
Year	Schenevus	Worcester
2015-16	3	10
2016-17	3	6
2017-18	5	5
2018-19	6	12
2019-20	6	13
Average	4.6	9.2

The number of home-schooled children in Schenevus has remained quite constant from 2015-16 through 2019-20. Worcester experienced a drop in the number of home-schooled children in 2016-17 and 2017-18 but the number has recently increased to levels similar to 2015-16. Worcester has slightly more students whose parents choose to educate at home, but in the case of either district, if all the parents decide to send their children to the local public school these numbers would have little impact on the enrollment projections.

The number of district resident students in non-public schools is sometimes an important consideration when projecting future enrollments, especially if there is a large number and the possibility of one or more of the non-public schools closing and students returning to the public school system. As presented in Table 2.6, the numbers in Schenevus and Worcester are very small and would, therefore, have no impact on the enrollment estimates.

<b>Table 2.6 Number of Resident Students Attending Non-Public Schools from 2015-16 to 2019-20</b>		
Year	Schenevus	Worcester
2015-16	4	2
2016-17	3	2
2017-18	1	3
2018-19	1	4
2019-20	3	3
Average	2.4	2.8

Each district has a tuition policy that states that non-resident students, with very few exceptions as detailed in the policy, are generally not accepted (Schenevus #5152,

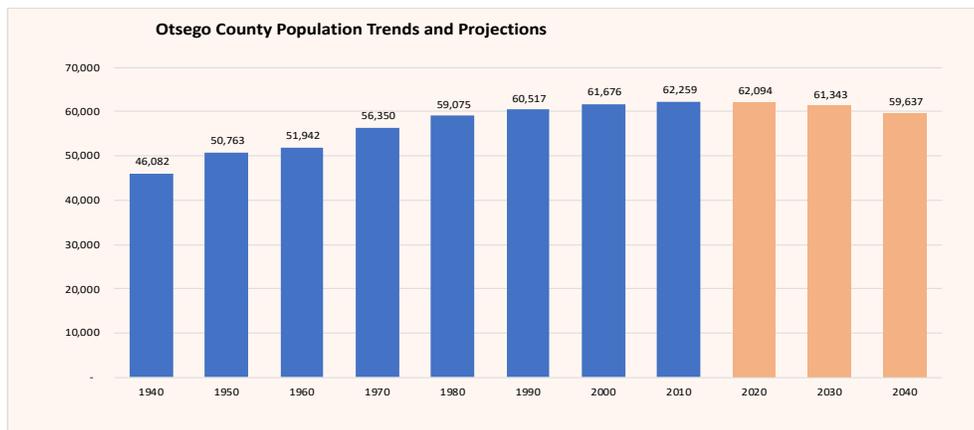


Worcester #7132). As documented in Table 2.7 that follows, the number of non-resident students attending each district is small and stable and will, therefore, have no significant impact projected future student enrollments.

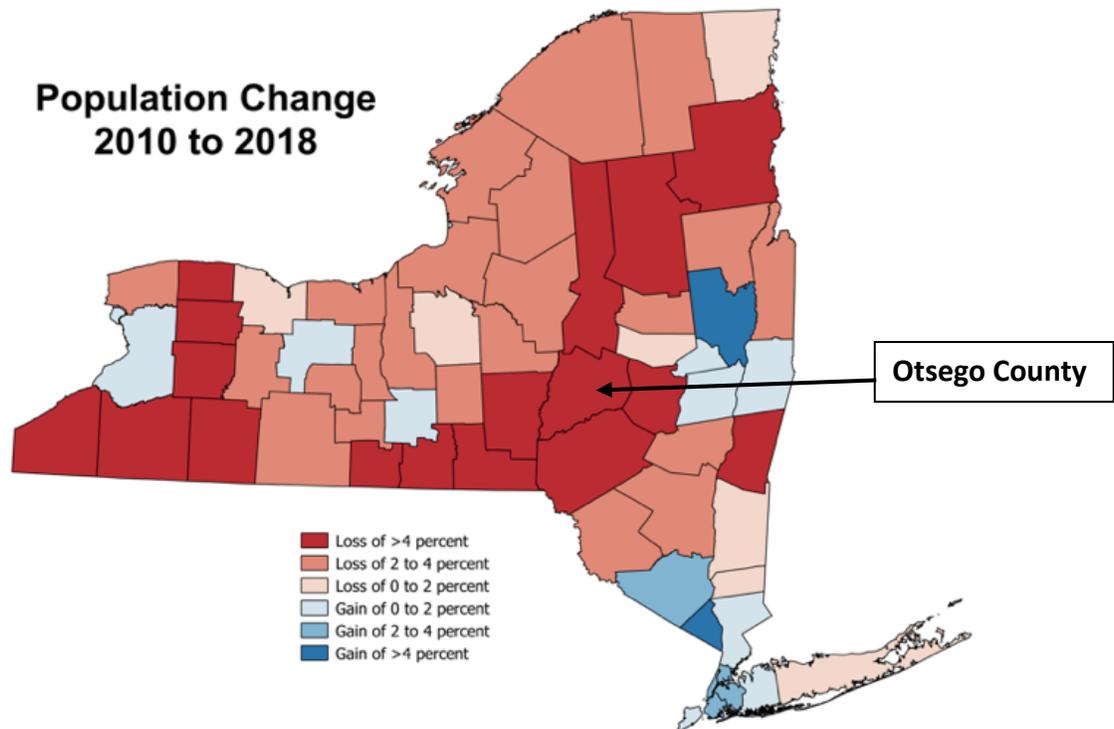
Table 2.7 Number of Non-Resident Students Attending Each District* 2015-16 to 2019-20		
Year	Schenevus	Worcester
2015-16	8	9
2016-17	10	10
2017-18	9	11
2018-19	12	12
2019-20	11	13
Average	10	11
*Table includes non-resident students that are the children of district staff members and non-resident students that have been placed in foster care in the district.		

It is safe to conclude that the number of home-schooled students, non-resident students attending either district, and resident students attending schools outside of the district are inconsequential. As a result, projected student enrollments in Tables 2.2, 2.3, and 2.4 do not need to be adjusted and are valid estimates.

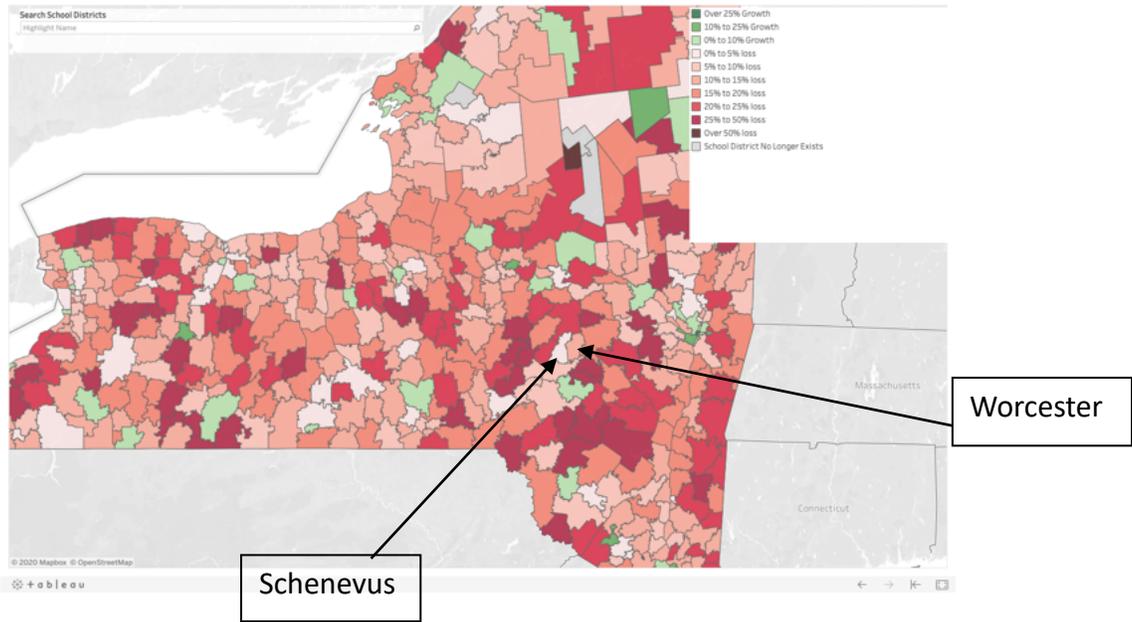
When considering school district enrollment trends, it is also important to consider regional population trends. The following chart illustrates the population history and projections for Otsego County as documented by the U.S. Census Bureau. Unlike many counties in upstate New York, the population in Otsego County increased slowly but steadily in each decade beginning with 1940 and continuing through 2010. Projections for the next several decades indicate a slight population decline is likely to occur.



The map below examines the population history in New York State counties for each year from 2010 to 2018. Interestingly, the actual data for Otsego County during this period is contradictory to the 2020 population estimates. The map shows that the population for Otsego County has declined by more than 4% from 2010 to 2018. It would lead one to conclude that actual 2020 population decline for Otsego County will be even more pronounced than the Census Bureau projection for 2020. The projection estimates a 0.3% decrease while the actual data are tracking in excess of a 4% population decline. Based on these data, it is unlikely that either Schenevus or Worcester will experience significant student enrollment growth in future years.



Lastly, we consider the school district population change from 2008-09 to 2018-19 as compiled by The Empire Center for Public Policy. The population of the Schenevus district decreased by 0%-5% during this time period while the population of the Worcester district decreased by 5-10% as shown in the map that follows.



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**The population of Otsego County has declined in the past decade and is projected to continue to decline. Correspondingly, the enrollment of the Schenevus and Worcester school districts has also declined over the same period and no future enrollment growth should be anticipated.**

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## Chapter 3

### Instructional/Extra-Curricular Program

The grade configuration varies from one school district to the other. Research on grade configuration is inconclusive as to the one best arrangement. In a study of this sort, it is important to begin by describing the existing grade organization of the two districts. As can be seen from Table 3.1, Schenevus groups grades into three areas--a Pre-K through grade 5 elementary school, a 6-8 middle school, and 9-12 high school. Worcester is organized with a Pre-K-6 elementary school and a 7-12 secondary school. Both districts house their instructional program in a single building located in the center of their communities.

<b>Table 3.1</b>	
<b>Grade Configurations of the Study Districts</b>	
<b>Schenevus</b>	<b>Worcester</b>
Pre-K-5; 6-8; 9-12	Pre-K-6; 7-12

We now turn our attention to the instructional program at each level of schooling in the study districts. For convenience sake, the following sections are grouped as elementary (Pre-K-6) and secondary (7-12).

#### *Elementary School (Pre-K-6)*

The best place to start describing the instructional program of any school or school district is with an overview of the instructional day. As the following table illustrates, the two districts have slightly different school days for their students. While the student day in both districts begins at 8 am, the student day in Worcester is thirteen minutes longer than the student day in Schenevus. Staff in the two study districts also have somewhat different workdays. The length of the teacher day in Schenevus is 6 hours and 45 minutes while the teacher day in Worcester is 7 hours and 10 minutes. The Worcester teacher day begins at 7:50 am, ten minutes earlier than the Schenevus teacher day. Table 3.2 that follows shows the length of the student and teacher days in each district.

<b>Table 3.2 Elementary School Schedules</b>		
	Schenevus	Worcester
Staff Start	8:00	7:50
Staff End	2:45	3:00
Student Start	8:00	8:00
Student End	2:45	2:58

Both districts offer a Pre-K program in addition to the traditional elementary school program. Each district has one section of Pre-K students. Since Pre-K is a voluntary program and the enrollment has the potential to vary significantly from one year to another, analysis of elementary class sizes will examine grades K-6. Table 3.3 presents a summary of the elementary school sections and the class size of each section.

<b>Table 3.3 Elementary Sections/Section Sizes 2019-20</b>		
Grade Level	Schenevus	Worcester
Pre-K	10	13
Kindergarten	16	14, 12
1 <sup>st</sup> Grade	12, 11	13
2 <sup>nd</sup> Grade	16	24
3 <sup>rd</sup> Grade	18	13, 15
4 <sup>th</sup> Grade	26	20
5 <sup>th</sup> Grade	26	25
6 <sup>th</sup> Grade	18 (MS)	16, 16
<i>Total Number of Sections w/o Pre-K</i>	<i>8</i>	<i>10</i>
<i>Total Number of Students w/o Pre-K</i>	<i>143</i>	<i>168</i>
<i>Average Section Size w/o Pre-K</i>	<i>17.9</i>	<i>16.8</i>

For purposes of examining the elementary school enrollment data, it will be assumed that the one section of sixth grade that Schenevus has in its middle school is an elementary level classroom. Examining the data in Table 3.3 shows that Schenevus has eight elementary sections for grades K-6 while Worcester has ten sections for grades K-6. Section sizes vary in Schenevus from 11-26 (excluding Pre-K) while in Worcester the smallest class size is 12 with the largest being 25. For practical purposes, the section sizes in each district are very similar. Both districts have elementary classes that are well below state averages.

If a merger was to occur and one elementary school were to exist, there would be the potential to possibly merge some of the elementary classrooms and achieve some economy of scale. Table 3.4 that follows projects what the elementary section sizes could be in a merged district with class size limits of 22 in the primary grades and 26 in the intermediate grades. These assumed limits are approximately consistent with current class sizes for the two districts.

<b>Table 3.4</b>	
<b>Projected Elementary Section Sizes in Merged District</b>	
<b>22 Students Maximum in Primary and 26 Students Maximum in Intermediate</b>	
Grade Level	Merged District
Pre-K	n/a
Kindergarten	21, 21
1 <sup>st</sup> Grade	18, 18
2 <sup>nd</sup> Grade	20, 20
3 <sup>rd</sup> Grade	15, 15, 16
4 <sup>th</sup> Grade	23, 23
5 <sup>th</sup> Grade	26, 25
6 <sup>th</sup> Grade	25, 25
<i>Total Number of Sections w/o Pre-K</i>	<i>15</i>
<i>Total Number of Students w/o Pre-K</i>	<i>311</i>
<i>Average Section Size w/o Pre-K</i>	<i>20.7</i>

Comparing the current elementary section sizes shown in table 3.3 with the projected elementary section sizes in a merged district shown in table 3.4 provides some interesting information. Currently, there are 311 students in the two elementary schools being educated in 18 sections as shown in table 3.3. Should the districts decide to merge, these 311 students could be educated in one building with 15 elementary sections as shown in table 3.4, a reduction of three sections or three teachers. Given this scenario, the average elementary class size in the merged district would be 20.7 compared with a current average elementary class size of 17.9 in Schenevus and 16.8 in Worcester.

The heart of every school’s instructional program is its core academic curriculum. Table 3.5 summarizes the elementary curriculum in both study districts. Examining this table, we find that there are some similarities in instructional program materials in use such as the New York State Modules in Mathematics yet there are some differences that would have to be resolved. Should the districts decide to merge and have one elementary

school, it is important that there is an articulated curriculum across all grade levels with appropriate teaching materials. This will involve a process of teachers, administrators, and perhaps parents to finalize the curriculum and teaching materials that will be used to implement that curriculum. Once finalized, professional development for the teaching staff on the final curriculum and instructional approaches will be required.

<b>Table 3.5 Elementary Curriculum</b>		
<b>Curricular Area</b>	<b>Schenevus</b>	<b>Worcester</b>
Language Arts	<ul style="list-style-type: none"> <li>○ Core ELA-Amplify Core Knowledge Language Arts</li> <li>○ RTI-Code Knowledge Intervention</li> </ul>	<ul style="list-style-type: none"> <li>○ Scholastic Guided Reading; Fountas &amp; Pinnell Benchmark Assessments</li> </ul>
Writing	<ul style="list-style-type: none"> <li>○ Amplify Core Knowledge</li> </ul>	<ul style="list-style-type: none"> <li>○ Lucy Calkins Writer’s Workshop</li> </ul>
Mathematics	<ul style="list-style-type: none"> <li>○ Math Modules-Engage NY</li> </ul>	<ul style="list-style-type: none"> <li>○ Math Modules-Engage NY</li> </ul>
Science	<ul style="list-style-type: none"> <li>○ K-5 Mystery Science packs</li> </ul>	<ul style="list-style-type: none"> <li>○ 1-6 Foss Science Kits</li> </ul>
Social Studies	<ul style="list-style-type: none"> <li>○ Amplify Core Knowledge and teacher created materials</li> </ul>	<ul style="list-style-type: none"> <li>○ Scholastic News, Harcourt Horizons, &amp; Teacher Created Materials</li> </ul>

Finally, to ensure a more complete picture of the elementary instructional program, it is necessary to present a summary of student academic performance. At the elementary and middle levels in New York State, the best way to accomplish this is by examining student performance on the English/Language Arts (ELA) and Mathematics state tests administered in grades 3-8. Before presenting recent results for Schenevus and Worcester, it is important to understand the rating system currently used in New York. The following summary describes the current four-level system in place.

Performance Level Descriptors

*Grades 3-8 Assessment System*

**Level 1-Not Meeting Learning Standards**

Student performance does not demonstrate an understanding of the content expected in the subject and grade level.

**Level 2-Partially Meeting Learning Standards**

Student performance demonstrates a partial understanding of the content expected in the subject and grade level.

**Level 3-Meeting Learning Standards**

Student performance demonstrates an understanding of the content expected in the subject and grade level.

**Level 4-Meeting Learning Standards with Distinction**

Student performance demonstrates a thorough understanding of the content expected in the subject and grade level.

The following two tables present a four-year summary of the percent of students scoring at each achievement level in both of the study districts in grades 3-8.

<b>Table 3.6</b> <b>NYS English/Language Arts Test Results 2015-16 to 2018-19</b> <b>Grades 3-8</b> <b>Percentage of Students Scoring at Each Level</b>								
Level	2015-16		2016-17		2017-18		2018-19	
	SCH (109)	WOR (72)	SCH (112)	WOR (84)	SCH (103)	WOR (80)	SCH (133)	WOR (132)
1	38	47	34	42	29	43	26	36
2	39	35	41	42	37	40	32	36
3	18	18	18	17	24	18	33	24
4	6	0	7	0	10	0	9	3
Overall Proficient	24	18	25	17	34	18	42	27
Overall Proficient- Otsego County	34		34		38		38	
Overall Proficient- NYS	38		40		45		45	
( ) indicates the number of students tested								

<b>Table 3.7</b> <b>NYS Math Test Results 2015-16 to 2018-19</b> <b>Grades 3-8</b> <b>Percentage of Students Scoring at Each Level</b>								
Level	2015-16		2016-17		2017-18		2018-19	
	SCH (89)	WOR (67)	SCH (102)	WOR (77)	SCH (104)	WOR (74)	SCH (127)	WOR (130)
1	37	43	34	39	37	28	30	27
2	30	37	38	38	30	39	39	36
3	21	15	19	19	21	29	28	24
4	11	4	9	4	13	4	3	12
Overall Proficient	32	19	28	23	34	33	31	36
Overall Proficient- Otsego County	37		36		40		41	
Overall Proficient- NYS	39		40		45		47	
( ) indicates the number of students tested								

Based on the performance level descriptors identified prior to the two tables above, it is the goal of every school district to get all students to levels 3 and 4 where these students are either meeting the learning standards or meeting the learning standards with distinction. The combination of the percentage of students at levels 3 and 4 is shown in the two tables above in the row labeled Overall Proficient.

In examining the two tables above, it is clear that, other than the 2018-19 ELA assessment, a greater percentage of students in Schenevus achieved levels 3 and 4 than did the students in Worcester. While that conclusion is quite clear, caution should be exercised in making too much of this data. First, small districts can have percentage results that could vary greatly because of the small number of students being tested...two or three students can change the percentage data significantly. In addition, the state has changed these assessments in recent years. Also, some students have decided to opt out from taking the assessments, another factor that can influence the final data. Finally, the variation of proficiency varies greatly across the state. Given all of these factors, while

the data from the two districts are different, it is quite apparent that these results are more similar than they are different.

**Grades 7-12**

As was done with the elementary schools, we now look at the curriculum and section sizes that exist in the secondary schools in the table that follows. For example, in the table that follows, Schenevus has two sections of English 7, one with 15 students and one with 14 students; Worcester also has two sections of English, both with 13 students. Table 3.8 that follows provides this data for all courses offered in both districts in grades 7-12. It should also be noted that Schenevus has its 6<sup>th</sup> grade in its middle school with 18 students who are not included in this table.

<b>Table 3.8</b>				
<b>7-12 Course Offerings by Section-2019-20</b>				
Course	Schenevus Sections & Section Sizes	Worcester Sections & Section Sizes	# of Students	# of Sections
<b>ENGLISH</b>				
English 7	15, 14	13, 13	55	4
English 8	20	12, 12	44	3
English 9	21	12, 12	45	3
English 10	26	15, 15	56	3
English 11	12, 15	22	49	3
English 12	16		16	1
Young Adult Lit		6	6	1
Sci Fi-1/2 year		7	7	1
Introduction to Films-1/2 year		7	7	1
College English 12	1		1	1
Speaking-1/2 year-Distance Learning	2		2	1
Yearbook/Journalism	3		3	1
<b>SOCIAL STUDIES</b>				
Social Studies 7	13, 18	13, 13	57	4
Social Studies 8	23	12, 12	47	3
Global History 1	21	12, 12	45	3
Global History 2	25	15, 15	55	3
US History & Government	20	14	34	2
Participation in Government-1/2 year	2, 15	22	39	3
Economics-1/2 year	6, 16	22	44	3
Psychology-1/2 year-Distance Learning	3		3	1
Sociology-1/2 year-Distance Learning	4		4	1
College Psychology-1/2 year		8	8	1
Local History		8	8	1
AP/College US History	9	8	17	2

<b>MATH</b>				
Math 7	13, 18	13, 13	57	4
Math 8	14	12, 12	38	3
Pre-Algebra	8		8	1
Algebra	-	18	18	1
Algebra 9	16	6	22	2
Algebra 10	10	10	20	2
Geometry	13	20	33	2
Algebra 2/Trig	7	13	20	2
Pre-Calculus	7		7	1
Pre-Calculus-1/2 year		8	8	1
Calculus		8	8	1
Math for Financial Literacy	14		14	1
Personal Finance-1/2 year-Distance Learning	1		1	1
Math & Financial Applications		9	9	1
<b>SCIENCE</b>				
Science 7	18, 13	13, 21	65	4
Science 8	17	12, 12	41	3
Earth Science*	23	19, 11	53	3
Living Environment (Biology)*	8, 16	12, 12	48	4
College Biology	2		2	1
Chemistry*	8	16	24	2
Physics*	5		5	1
Modified Science	4		4	1
Forensics-1/2 year-Distance Learning	7		7	1
Forensics-1/2 year		3	3	1
Environmental Science	14		14	1
<b>SPANISH</b>				
Spanish 7-1/2 year	13, 17		30	2
Spanish 8	20	12, 12	44	3
Spanish 1	16	23	39	2
Spanish 2	7	13	20	2
Spanish 3	3	10	13	2
Spanish 4		5	5	1
Independent Spanish 1, 2, & 3	2		2	1
<b>BUSINESS</b>				
Business Communications-1/2 year	-	17	17	1
Accounting	1		1	1
<b>TECHNOLOGY</b>				
STEM 7	15, 17	13, 13	58	4
<b>MUSIC</b>				
Band-1/2 year	19, 24		43	2
Junior Band		31	31	1

High School Band		28	28	1
Chorus-1/2 year	29, 35		64	2
Junior Chorus		33	33	1
High School Chorus		23	23	1
Songwriting-1/2 year	8		8	1
Music Elective	8	14	22	2
<b>ART</b>				
Art 7-1/2 year	13	17, 17	46	3
Studio in Art	1, 4, 20		25	3
College Drawing	6		6	1
<b>PHYSICAL EDUCATION, HEALTH &amp; HCS</b>				
Middle School Physical Ed	33, 17, 17	17, 24, 11, 12	131	7
High School Physical Ed	10, 34, 16, 23	12, 15	110	6
Independent Physical Ed	9		9	1
Health 7-1/2 year	-	17, 17	34	2
Health 8	23		23	1
Health 10-1/2 year	26	15, 15	56	3
Home & Career Skills-1/2 year	23	8, 8, 13, 13	65	5
<b>OTHER</b>				
College & Career Exploration	4	22	26	2
Professional Social Skills-1/2 year		12, 12	24	2
<b>RESOURCE ROOM</b>				
Resource Room	1, 2, 4, 4, 3, 5, 5, 6, 4	5, 10, 7, 8, 9, 5, 11, 5	94	17
<p>1. *Indicates classes that have labs</p> <p>2. Does not include study halls or RTI classes</p>				

Table 3.8 above shows the courses and the section sizes for the junior-senior high school academic programs. The districts offer a comparable academic program in the core academic areas. Worcester alternates offering chemistry and physics every other year. Both districts offer Spanish and a limited number of elective courses. Schenevus, being the larger of the districts, offers more electives than does Worcester. Like most small school districts, the elective courses in both districts generally have smaller enrollments. Also, the number of elective courses are somewhat limited. As is the case with other small school districts, there is limited capacity to offer more electives so students can acquire college credits while they are still in high school. Should a merger occur, students would have access to a broader array of courses going into college and, given that college credits can be earned in high school at very reasonable costs, increases

the probability that students will be able to complete a college degree with less financial consequence.

In addition to the courses listed in table 3.8, high school students from both districts have access to a wide array of Career and Technical Education courses from their local BOCES, the Otsego-Northern Catskills BOCES. Table 3.9 which follows shows the number of students from each of the districts who are currently taking CTE courses at BOCES.

<b>Table 3.9 Enrollment in BOCES Career &amp; Technical Education Courses-2019-20</b>		
	<b>Schenevus</b>	<b>Worcester</b>
<b>Junior Class</b>		
No. of Students in Class	30	20
No. of Students in BOCES CTE	17	12
<b>Senior Class</b>		
No. of Students in Class	28	23
No. of Students in BOCES CTE	13	12
<b>Total</b>		
No. of Juniors and Seniors in BOCES CTE Courses	30 of 58	24 of 43
% of Juniors & Seniors in BOCES CTE Courses	52%	56%

In looking at table 3.9 above, it is apparent that a significant number of juniors and seniors from both districts take advantage of Career and Technical Education courses at the ONC BOCES. Approximately 46% of the juniors and seniors in Schenevus and nearly 69% of the juniors and seniors in Worcester spend half of their days on the BOCES campus taking CTE courses.

Now that the course offerings have been identified for both districts, we turn to a further analysis of these academic programs. As is the case in most smaller school districts, the number of electives, advanced placements courses, and specialized curricular offerings is somewhat limited. This is simply due to the challenge of programming for small high schools. In addition, with a limited number of students, there are often a significant number of small classes in small junior-senior high schools. This is

the case with Schenevus and Worcester. Table 3.10 that follows shows the number of classes that each district offers that has fewer than ten students in the class.

<b>Table 3.10 Grades 7-12 Section Sizes with Fewer Than 10 Students*</b>						
Course Area	Schenevus			Worcester		
	Number of Courses	Number of Sections	Number of Sections with Fewer than 10 Students	Number of Courses	Number of Sections	Number of Sections with Fewer than 10 Students
English	9	11	3	8	12	3
Social Studies	10	13	5	10	14	3
Math	10	11	4	10	12	4
Science	10	12	6	6	10	1
Spanish	6	7	3	5	6	1
Business	1	1	1	1	1	0
Technology	1	2	0	1	2	0
Music	4	6	2	5	5	0
Art	3	5	3	1	2	0
PE & Health	4	9	1	1	6	0
Home/Career Skills	1	1	0	1	4	2
<b>TOTAL</b>	<b>59</b>	<b>78</b>	<b>28 (35.9%)</b>	<b>49</b>	<b>74</b>	<b>14 (18.9%)</b>

As seen in Table 3.10, Schenevus has 35.9% of its classes with fewer than ten students while Worcester has 18.9% of its classes that have fewer than ten students. However, this statistic is a bit misleading. Most of the very small class sizes in Schenevus are in Distance Learning or Advanced Placement courses. This tends to drive down the average class size. However, the trade-off for small classes is the number of courses that are available to students. As can be seen in Table 3.10, Schenevus offers 59 courses to its students in grades 7-12 while Worcester offers 49 courses.

While there is nothing inherently wrong with small class sizes, the challenge for small districts is how long they can maintain these course offerings with so few students enrolled, given the fiscal realities that school districts in New York State face today. When finances are limited and reductions have to be made, classes with very low enrollments are often the first things to be cut. Over time, this has the effect of reducing the number of opportunities for students.

At the same time that Schenevus has a greater percentage of classes with fewer than ten students, it is equally clear that Schenevus offers 78 sections of classes and 59 courses while Worcester offers 74 sections of classes and 49 courses. This greater number of sections is reflective of the fact that Schenevus offers a greater number of electives for its students than does Worcester.

While the limited number of electives and the number of classes with small enrollments is a reality, it should again be emphasized that neither of these two school districts is doing anything wrong; this is simply the effect of small school districts managing declining enrollments in a time of fiscal challenges. However, it is also quite possible that this trend will continue into the future unless these districts start doing business differently.

Having looked at the current program opportunities available to students as well as some of the challenges these districts will continue to face in the future, we now turn to an analysis of what the instructional program might look like should the districts decide to merge. In addition to showing the current classes being offered, the number of sections, and the section sizes, Table 3.11 that follows also shows what might reasonably be expected to happen to the section sizes should the two districts decide to merge. As noted in the statement of beliefs, this analysis assumes that all of the courses that are currently being offered will continue to be offered. No new course offerings have been introduced in this analysis. The creation of section sizes in the potentially merged district is guided by the assumption that class size will not exceed twenty-two students. Because of the unusual class sizes, physical education, resource rooms, and study halls have not been included.

We also believe that the consolidation of classes described in the following table is very plausible given the size of a new merged high school. Scheduling students in a smaller high school offers limited flexibility. The limited number of periods, BOCES classes, limited certification flexibility for staff, and facilities constraints often limit scheduling options. Should the high schools merge, we believe that much more flexibility would be available for arranging student schedules and therefore the reductions in section numbers identified could be realized.

Finally, a word of caution is offered. The reduction in the number of sections shown in the following table should not be assumed to be directly connected to staff

reductions. Following mergers, curriculum opportunities often expand for students, a concept that is supported by the statement of beliefs for these two districts. Table 3.11 frees up teacher schedules in order to potentially offer more electives and broaden the high school curriculum. It is also noted that the statement of beliefs adopted by the two boards of education have determined that any staff reductions will be made through attrition. This means that a combination of more electives and staff reductions through attrition can be implemented over an extended period of time. This would have the long-term effect of reducing staff costs while increasing program offerings for the students.

<b>Table 3.11 Secondary Course Offerings in a Merged District (Maximum of 22 Students/Section)</b>									
Course	SCH	WOR	# of Stu's	# of Sec's		Merged District	# of Sec's	# of Fewer Sec's	Net Reduction in Sections
<b>ENGLISH</b>									
English 7	15, 14	13, 13	55	4		55	3	1	2 less sections
English 8	20	12, 12	44	3		44	2	1	
English 9	21	12, 12	45	3		45	3	0	
English 10	26	15, 15	56	3		56	3	0	
English 11	12, 15	22	49	3		49	3	0	
English 12	16		16	1		16	1	0	
Young Adult Lit		6	6	1		6	1	0	
Sci Fi-1/2 year		7	7	1		7	1	0	
Intro to Films-.5 year		7	7	1		7	1	0	
College English 12	1		1	1		1	1	0	
Speaking-1/2 year-Distance Learning	2		2	1		1	1	0	
Yearbook/Journalism	3		3	1		3	1	0	
<b>SOCIAL STUDIES</b>									
Social Studies 7	13, 18	13, 13	57	4		57	3	1	4 fewer sections
Social Studies 8	23	12, 12	47	3		47	3	0	
Global History 1	21	12, 12	45	3		45	3	0	
Global History 2	25	15, 15	55	3		55	3	0	
US History & Government	20	14	34	2		34	2	0	
Participation in Government-1/2 year	2, 15	22	39	3		39	2	1	
Economics-1/2 year	6, 16	22	44	3		44	2	1	
Psychology-1/2 year-Distance Learning	3		3	1		3	1	0	
Sociology-1/2 year-Distance Learning	4		4	1		4	1	0	
College Psychology		8	1	1		8	1	0	
Local History		8	8	1		8	1	0	

AP/College US History	9	8	17	2		17	1	1	
<b>MATH</b>									
Math 7	13, 18	13, 13	57	4		57	3	1	6 fewer sections
Math 8	14	12, 12	38	3		38	2	1	
Pre-Algebra	8		8	1		8	1	0	
Algebra	-	18	18	1		18	1	0	
Algebra 9	16	6	22	2		22	1	1	
Algebra 10	10	10	20	2		20	1	1	
Geometry	13	20	33	2		33	2	0	
Algebra 2/Trig	7	13	20	2		20	1	1	
Pre-Calculus	7		7	1		15	1	1	
Pre-Calculus-1/2 year		8	8	1					
Calculus-1/2 year		8	8	1		8	1	0	
Math for Financial Literacy	14		14	1		14	1	0	
Personal Finance-1/2 year-Distance Learning	1		1	1		1	1	0	
Math & Financial Applications		9	9	1		9	1	0	
<b>SCIENCE</b>									
Science 7	18, 13	13, 21	65	4		65	3	1	4 less sections
Science 8	17	12, 12	41	3		41	2	1	
Earth Science*	23	19, 11	53	3		53	3	0	
Living Environment (Biology)*	8, 16	12, 12	48	4		48	3	1	
College Biology	2		2	1		2	1	0	
Chemistry*	8	16	24	2		24	2	0	
Physics*	5		5	1		5	1	0	
Modified Science	4		4	1		4	1	0	
Forensics-1/2 year-Distance Learning	7		7	1		10	1	1	
Forensics-1/2 year		3	3	1					
Environmental Science	14		14	1		14	1	0	
<b>SPANISH</b>									
Spanish 7-1/2 year	13, 17		30	2		30	2	0	3 less sections
Spanish 8	20	12, 12	44	3		44	2	1	
Spanish 1	16	23	39	2		39	2	0	
Spanish 2	7	13	20	2		20	1	1	
Spanish 3	3	10	13	2		13	1	1	
Spanish 4		5	5	1		5	1	0	
Independent Spanish 1, 2, & 3	2		2	1		2	1	0	
<b>BUSINESS</b>									
Business Communications-1/2 year	-	17	17	1		17	1	0	-

Accounting	1	-	1	1		1	1	0	
<b>TECHNOLOGY</b>									
STEM 7	15, 17	13, 13	58	4		20, 19, 19	3	1	1 fewer section
<b>MUSIC</b>									
Band-1/2 year	19, 24		43	2					n/a
Junior Band		31	31	1		31	1	0	
High School Band		28	28	1		28	1	0	
Chorus-1/2 year	29, 35		64	2					
Junior Chorus		33	33	1		33	1	0	
High School Chorus		23	23	1		23	1	0	
Songwriting-1/2 year	8		8	1		8	1	0	
Music Elective	8	14	22	2		11, 11	2	0	
<b>ART</b>									
Art 7-1/2 year	13	17, 17	46	3		15, 15, 16	3	0	1 fewer section
Studio in Art	1, 4, 20		25	3		12, 13	2	1	
College Drawing	6		6	1		6	1	0	
<b>PHYSICAL EDUCATION, HEALTH, &amp; HCS</b>									
Middle School Physical Ed	33, 17, 17	17, 24, 11, 12	131	7					n/a
High School Physical Ed	10, 34, 16, 23	12, 15	110	6					
Independent Physical Ed	9		9	1					
Health 7-1/2 year	-	17, 17	34	2		17, 17	2	0	-
Health 8	23		23	1		23	1	0	
Health 10-1/2 year	26	15, 15	56	3		18, 18, 19	3	0	
Home & Career Skills-1/2 year	23	8, 8, 13, 13	65	5		16, 16, 16, 17	4	1	1 less section
<b>OTHER</b>									
College & Career Exploration	4	22	26	2		13, 13	2	0	-
Professional Social Skills-1/2 year		12, 12	24	2		12, 12	2	0	
<b>RESOURCE ROOM</b>									
Resource Room	1, 2, 4, 4, 3, 5, 5, 6, 4	5, 10, 7, 8, 9, 5, 11, 5	94	17		-	-	-	-

Table 3.11 above shows that, in a merged district, all of the courses that are currently offered could continue to be offered...and they could be offered with fewer staff. Research on merged school districts has consistently found that academic opportunities for students increase after a merger, largely because there is a larger student population in the high school. Such could also be the case here. In addition to reducing staff, a merger could significantly enhance the high school offerings that are currently available to the students of these two districts. This would directly improve one issue that both districts face with students leaving school early in the day in their junior and/or senior year because they have run out of attractive electives to pursue. Because of the limited number of elective courses, some students take all of the courses that are available in their areas of interest and simply have no more courses to pursue; this leads to some students leaving the building before the end of the school day.

In addition, a larger high school would allow more college credit bearing courses, more electives, more Honors courses, and more Advanced Placement courses to be available for the students. It might be possible to offer a second language. Offerings in business and the arts could be increased. It will be up to the administration and the board of education of the merged district to determine the breadth of the high school curriculum. However, all courses currently offered in each district would continue and other courses would be added. A merger would provide the potential for a greater number of options than would otherwise exist in either of the two individual high schools in the future.

Each section of an academic course represents a period of an academic teacher's time. Additional support staff might also be represented by these blocks of time. By eliminating sections of classes, at least two opportunities potentially exist for the merged district. First, is it possible to replace those sections with additional courses, thereby increasing the program opportunities for students? Or, on the other hand, by reducing the number of sections, is it possible to reduce staff by attrition and thereby reduce budget expenses? Table 3.12 that follows is extracted from Table 3.11 and shows the number of sections of courses that could potentially be reduced in a merged district.

<b>Table 3.12</b> <b>Number of Middle and High School Section Reductions by Subject Area</b> <b>(Maximum of 22 Students Per Regular Section)</b>		
	# Of Section Reductions	@ 80%
English	2	1
Social Studies	4	3
Math	6	5
Science	4	3
Spanish	3	2
Business	0	-
Technology	1	1
Music	0	-
Art	1	1
Home & Career Skills	1	1
Total	22	17

While 100% savings might be difficult to achieve, this table also shows that 80% of the savings could be turned into additional curricular opportunities and/or reduced staff.

In summary, should the two school districts merge, it would be reasonable to assume that approximately 15-20 sections of courses could be freed up at the middle/high school level. This reduction could occur without any current courses from either district being eliminated.

Smaller school districts all across New York State have faced declining student enrollments and significant financial challenges. As a result, the program that has been offered to the students in many of these districts has changed. These program and staffing changes have also occurred in Schenevus and Worcester. Table 3.13 that follows shows the program and staffing additions and reductions that have occurred in these two districts for the four-year period from 2016-17 to 2019-20.

<b>Table 3.13</b>	
<b>Staff/Program Additions and Reductions-2016-17 to 2019-20</b>	
Schenevus	Worcester*
<b>Staff/Program Additions</b>	
2 Bus Drivers (2 Hr.) 1 Head Maintenance/Head Bus Driver 1 .6 Network /Technology Coordinator 1 LCSW	CFA Studio Art DL-Sociology DL-Computer Applications Math 7 RTI Math 8 RTI Math Lab 9 Math Lab 10/11 AP Lit Global 1 RTI Global 2 RTI Computer Applications Keyboarding ELA 7 RTI ELA 8 RTI HS Jazz Chorus Driver's Ed Business Communications 7 Business Communications 5 & 6 Music 7 Jazz Band Young Adult Lit Learning Center ELA Learning Center Math Modern Awesome Art Online Cobleskill Animal Science DL-Criminal Justice
<b>Staff/Program Reductions</b>	
1 Business Teacher 4 Elementary Teachers 2 Driver/Cleaners 1 Supt of Buildings and Grounds 1 Director of Transportation 1 Elementary Counselor 1 Physical Education Teacher 1 Occupational Therapist 1 Library Media Specialist 7 Teacher Aides 1 Special Education Teacher	Exploring Science Class Tech 5 <sup>th</sup> & 6 <sup>th</sup> Class Advance Art Class AIS Global Class AP World History Class AP US History Class DL-Sociology Class AP Literature Class Global 1 RTI Class Global 2 RTI Class
* In Worcester, chemistry and physics are offered in alternate years	

In analyzing Table 3.13, a number of observations can be made. At first glance, it appears that Worcester has added a large number of programs in the past four years. However, a number of the programs that were added were also deleted within the four year time period. These programs include Distance Learning Sociology, AP Lit, Global 1 AIS, and Global 2 AIS. In addition, many of the programs that Worcester has added are more oriented to remedial/intervention opportunities rather than significant program enhancements. These include Math 7 RTI, Math 8 RTI, Math Lab 9, Math Lab 10/11, Global 1 RTI, Global 2 RTI, ELA 7 RTI, and ELA 8 RTI. Finally, comparing the items in this table can be misleading: at first glance, the list appears to show many more reductions in Worcester. However, the reductions in Schenevus are reductions of full time staff members while the reductions in Worcester are primarily individual classes. In truth, more reductions have been made in Schenevus over the past four years than in Worcester.

From Table 3.13, what appears to be more significant than the program additions that have been made are the reductions in programs and staff that have taken place. In the past four years, Schenevus has eliminated ten teacher/counselor/therapist positions as well as seven teacher aides. Worcester has eliminated its AP program for World History, US History, and Literature and its technology program for 5<sup>th</sup> and 6<sup>th</sup> graders. In addition, Worcester alternates chemistry and physics courses every other year. These reductions have resulted in a high school program that is fairly limited in both districts, especially as it relates to electives and Advanced Placement courses to challenge the higher achieving students.

As with the elementary and middle school student performance summaries, we now turn to examine high school student performance on New York State Regents examinations. Table 3.14 that follows provides this data for all students on high school Regents examinations. The incomplete nature of this table is due to the state's phase into the Regents examinations developed from the common core curriculum.

<b>Table 3.14 Student Performance on State Regents Examinations</b>							
Exam	Year	# of Students Taking Exam SCH/WOR	% at Level 1 (0-54) SCH/WOR	% at Level 2 (55-64) SCH/WOR	% at Level 3 (65-77) SCH/WOR	% at Level 4 (78-84) SCH/WOR	% at Level 5 (85-100) SCH/WOR
English	16-17	35/25	14/4	6/8	29/24	17/28	34/36
English	17-18	22/29	0/3	5/10	32/14	18/34	45/38
English	18-19	27/25	7/0	4/8	26/36	48/24	14/32
Algebra	16-17	36/17	8/6	3/6	61/24	25/18	3/47
Algebra	17-18	36/26	0/0	19/4	61/54	8/19	11/23
Algebra	18-19	31/30	0/3	19/17	61/37	19/23	0/20
Geometry	16-17	20/16	15/0	30/13	45/81	10/0	0/6
Geometry	17-18	23/13	0/0	13/0	74/46	4/23	9/31
Geometry	18-19	17/11	12/0	18/9	47/36	6/27	18/27
Algebra 2	16-17	10/12	10/0	30/17	30/25	30/33	0/25
Algebra 2	17-18	16/14	6/0	13/7	56/64	13/14	13/14
Algebra 2	18-19	8/9	0/11	25/0	63/0	13/67	0/22
Global Hist	17-18	31/24	10/4	13/4	58/42	19/50	0/0
Global Hist	18-19	30/24	20/17	7/8	53/38	20/29	0/8
US History	17-18	25/27	8/4	20/0	48/52	24/44	0/0
US History	18-19	24/6	0/0	0/0	50/83	50/17	0/0
Biology	17-18	36/24	6/8	6/21	56/38	33/33	
Biology	18-19	30/37	3/3	10/16	57/54	30/27	
Earth Sci	17-18	26/18	4/0	19/11	50/22	27/67	
Earth Sci	18-19	33/16	6/0	39/6	30/50	24/44	
Chemistry	17-18	14/15	0/0	21/27	57/53	21/20	
Chemistry	18-19	12/3	8/-	17/-	75/-	0/-	

Table 3.14 above shows the performance of high school students from both districts on state Regents examinations. It goes without saying that the goal of any school district is to get as many students as possible to score at the highest possible levels. In examining the data in the table at the lower levels, there are times when more Schenevus students score below 65 and there are times when more Worcester students score below 65. Likewise, at the higher end, there are times when more Schenevus students score

above 85 and there are times when more Worcester student score above 85. These differences can be seen from year to year and from exam to exam. Looking at the big picture portrayed by the table, it is clear that high school student performance on Regents exams is more similar than different across the two districts.

At this point in the report, we have examined student performance on elementary, junior high, and high school assessments. Like in the elementary school and in the junior high school, comparing student performance results across both districts yields very similar results. Again, there are exams in various years where students in Schenevus outscored their counterparts in Worcester. However, in other years and with other exams, the opposite is true. In short, student performance on all assessments is more similar than different and should not be an issue should the districts decide to merge.

We now examine the types of diplomas that graduates of each high school receive. Table 3.15 that follows looks at the data for those graduates:



<b>Table 3.15 Diplomas Received By Graduates-4 Year Outcomes</b>				
Year	Diploma Type	Schenevus	Worcester	New York State
2015	Total Graduates	17/19 (89%)	25/31 (81%)	81%
	Regents Diploma	14 (74%)	18 (58%)	44%
	Advanced Regents Diploma	2 (11%)	7 (23%)	32%
	Local Diploma	1 (5%)	0	4%
	<i>Dropped Out</i>	0	1 (3%)	7%
	<i>Still Enrolled</i>	2 (11%)	4 (13%)	11%
2016	Total Graduates	22/28 (79%)	20/25 (80%)	82%
	Regents Diploma	14 (50%)	6 (24%)	46%
	Advanced Regents Diploma	6 (21%)	10 (40%)	31%
	Local Diploma	2 (7%)	4 (16%)	5%
	<i>Dropped Out</i>	1 (4%)	1 (4%)	6%
	<i>Still Enrolled</i>	3 (11%)	3 (12%)	10%
2017	Total Graduates	29/32 (91%)	18/24 (75%)	82%
	Regents Diploma	17 (53%)	10 (42%)	44%
	Advanced Regents Diploma	9 (28%)	6 (25%)	33%
	Local Diploma	3 (9%)	2 (8%)	5%
	<i>Dropped Out</i>	1 (3%)	0	6%
	<i>Still Enrolled</i>	1 (3%)	3 (13%)	10%
2018	Total Graduates	28/31 (90%)	21/27 (78%)	83%
	Regents Diploma	17 (55%)	11 (41%)	43%
	Advanced Regents Diploma	6 (19%)	8 (30%)	33%
	Local Diploma	5 (16%)	2 (7%)	6%
	<i>Dropped Out</i>	2 (6%)	0	6%
	<i>Still Enrolled</i>	1 (3%)	5 (19%)	10%

As can be seen in Table 3.15 above, the percentage of students who complete high school and earn a diploma is fairly similar in both districts although the graduation rate in Schenevus has been higher than the graduation rate in Worcester for three of the past four years. In addition, the graduation rate in Worcester has not exceeded the state average for any of the past four years. However, the number of students who achieve an Advanced Regents Diploma is usually higher in Worcester than it is in Schenevus. Once again, however, it appears that the graduation data from the two districts are quite similar.

An important aspect of any student's high school education is the availability of opportunities to offer a well-rounded education. Consequently, we now turn to student athletic and extra-curricular opportunities currently available to the high school students

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in the study districts. Table 3.16 that follows shows the athletic opportunities that are available to the students of the two study districts as well as the level of participation in each of these sports.

<b>Table 3.16</b>		
<b>Athletic Participation-2019-20</b>		
<b>FALL SPORTS</b>		
	Schenevus	Worcester
Girls Modified Soccer	14	19
Boys Modified Soccer	18	13
Girls Varsity Soccer	21	20
Boys Varsity Soccer	17	19
Boys Varsity Cross Country	5	
Girls Varsity Cross Country	3	
<b>WINTER SPORTS</b>		
Girls Modified Basketball	15	14
Boys Modified Basketball	7	12
Boys JV Basketball	6	9
Girls JV Basketball	2	7
Girls Varsity Basketball	12	9
Boys Varsity Basketball	9	13
<b>SPRING SPORTS</b>		
Varsity Baseball	20	14
Modified Baseball*	9	
Varsity Softball	15	17
Modified Softball	15	
Boys Varsity Track*	15	
Boys Modified Track*	6	
Girls Varsity Track*	12	
Girls Modified Track*	4	
*Sports teams shared between Schenevus and Worcester		

Athletic teams in a high school are usually a great sense of pride for a community and often times, districts are highly protective of their teams. However, the boards of education in Schenevus and Worcester should be commended on their initiative to combine athletic teams as participation numbers have declined. By their actions, they have made student participation and opportunity the most important factors in inter-scholastic athletics.

Schenevus and Worcester are both members of the Tri Valley Athletic League in Section IV. Both districts are classified as Class D schools, a classification that is

determined by the number of students that a school district has in grades 9-11 in the previous school year. Should a merger occur, the merged district enrollment in grades 9-11 in 2021-22, the year before the merger, would be very different from what it is in either district today. In 2021-22, the merged district is projected to have 157 students in grades 9-11. The current cutoff for Class D schools is 149 students. As a result, the merged district would be a Class C school, assuming that the class enrollment ranges do not change.

Given that the merged district will be a Class C school, the next question is whether or not the merged district would have to change league affiliation...not necessarily. Class designations are primarily used for classifying school districts for sectional and state championship competitions. While all of the districts currently in the Tri Valley League are all Class D schools, it is not at all unusual for leagues to have schools from different classes. For example, in the eastern part of Section IV, the STAC has 17 districts, 5 that are Class AA, 4 that are Class A, 7 that are Class B, and 1 that is Class C. The Midstate Athletic Conference has 12 schools, 9 that are Class C and 3 that are Class D.

Finally, class designations can vary from one sport to another. For example, the student enrollment limit for boys and girls cross country is 239 students so the merged district would remain a Class D school for that sport. Also, in many mergers, new athletic teams are created. Should the merged district decide to offer field hockey, girls volleyball, or boys/girls lacrosse, the student limits for those sports are also higher and the merged district would remain a Class D school for those sports as well. In the end, the class designation for 2022-23 will be determined by the sport and the 9-11 enrollment of the districts in 2021-22..

Table 3.17 that follows presents a summary of the clubs and extracurricular activities offered for the high school students in 2019-20.

<b>Table 3.17 Extra-curricular Activities-2019-20</b>		
<b>Activity</b>	<b>Schenevus</b>	<b>Worcester</b>
Art/Garden Club	9	
College for Every Student		65
Color Guard	11	12
Debate Club		12
Dragon Tones	15	
Indoor Soccer-Boys		20
Indoor Soccer-Girls		27
Jazz Band	11	
Marching Band	26	80
Musical	30	36
Middle School Music Club	64	
High School Music Club	55	
National Honor Society	6	10
National Junior Honor Society		17
S.A.D.D.	6	13
Student Council	12	18
Wolverine Pride Club		37
Yearbook	9	7

In analyzing the table above regarding clubs, it is apparent that the students in both high schools have access to a reasonable number of extra-curricular activities. Most districts are usually willing to start any club in which there is sufficient student interest and a faculty advisor can be secured. Districts find clubs much more affordable than interscholastic athletics and much easier to administer. Should a merger of the districts occur, students, faculty, and the board will determine which clubs will exist. It is safe to assume, however, that students in the merged middle and high school would have access to all of the clubs that currently exist in either school district. It can also be predicted that having more students at the secondary level in a merged district will create more opportunities for students to participate in clubs and other extra-curricular activities.

Finally, it is important to have a basic understanding of the special education program in each school district. Table 3.18 that follows summarizes the number of special needs students in Schenevus and Worcester for the past four academic years.

<b>Table 3.18 Number/Percentage of School Aged Students with Disabilities (SWD)</b>						
School Year	Schenevus			Worcester		
	# of SWD	K-12 Total	% of K-12 as SWD	# of SWD	K-12 Total	% of K-12 as SWD
2016-17	76	362	20.9%	93	332	28.0%
2017-18	71	352	20.2%	78	332	23.5%
2018-19	67	334	20.1%	84	327	25.7%
2019-20	69	323	21.4%	78	317	24.6%

In analyzing the data in Table 3.18, it is apparent that the number of students with disabilities in Worcester is higher than the number of similar students in Schenevus. Classification of students with disabilities is a process that may vary greatly from one school district to another. The philosophy of the district and the membership of the Committee on Special Education are two reasons why these data might be different. Should the two districts merge, a district-wide philosophy about identifying and programming for students with disabilities will have to be developed and implemented.

Beyond the number of students with disabilities, it is important to understand the number of students by disability type in both districts. Table 3.19 that follows provides that data.



<b>Table 3.19 Special Education Students by Disability-2017-18 to 2019-20</b>						
Disability	Schenevus			Worcester		
	2017-18	2018-19	2019-20	2017-18	2018-19	2019-20
Autism	3	4	5	3	5	3
Emotional Disturbance	6	4	4	2	4	4
Learning Disability	35	36	35	34	33	33
Intellectual Disability	3	2	3	0	0	0
Deafness	0	0	0	0	0	0
Hearing Impaired	0	0	1	1	1	1
Speech Impairment	5	4	4	8	7	7
Visual Impairment	0	0	0	0	0	0
Orthopedic Impairment	0	0	0	1	0	0
Other Health Impairment	11	11	11	22	19	19
Multiple Disabilities	7	5	5	7	8	8
Deaf – Blindness	0	0	0	0	0	0
Traumatic Brain Injury	1	1	1	1	1	1
<b>TOTAL</b>	<b>71</b>	<b>67</b>	<b>69</b>	<b>79</b>	<b>78</b>	<b>76</b>

As can be seen in Table 3.19, both districts have students with a variety of needs. While the numbers of students in Worcester are consistently higher, both schools’ numbers are quite consistent and the difference between the two districts is not extremely large.

Finally, we examine the location of services for special education students. For decades, the mandate for educating students with disabilities has been to educate these students in the least restrictive environment. For many districts, this has meant bringing many of the special education students back to the local district who were being educated in alternative sites off campus. This has been the case for both Schenevus and Worcester. Having said that, there are still some students with disabilities who are being educated in off campus sites. Table 3.20 that follows summarizes those placements.

<b>Table 3.20 Out of District Placement for Students with Disabilities-2019-20</b>		
Placement	Schenevus	Worcester
ONC BOCES-Milford	3	8
ONC BOCES-Grand Gorge	1	-
DCMO BOCES-Norwich	-	1
Springbrook	2	-
Pathfinder Village	-	1
Oneonta High School	1	-
Cobleskill-Richmondville Elementary School	-	2
Cobleskill-Richmondville Middle School	-	5
Cobleskill-Richmondville High School	-	2
<b>TOTAL</b>	<b>7</b>	<b>19</b>

In analyzing the special education data for Schenevus and Worcester, it is quite possible that the philosophy about student classification in the two districts is different. For districts of approximately the same size, Worcester consistently has more students classified with disabilities, a higher percentage of students who are classified, and has more students who receive programming out of district. Should this merger occur, a district wide philosophy of identifying and programming for students with disabilities will have to be developed.

## Chapter 4 Facilities

The construction, maintenance, and enhancement of educational facilities are extremely important functions of school administration. Capital costs to construct school facilities are significant. Housing children in safe and healthy facilities that are conducive to learning is an ongoing challenge. The physical structures in school districts have a great deal to do with the way that grades are aligned and programs are delivered. This section of the report will provide an overview of the current facilities that each of the study districts owns, how they are used, a general analysis of their conditions, and implications should a merger occur.

Instructional space in both districts is provided in a single building. An overview of the Schenevus and Worcester Central School buildings is provided in the following table 4.1. Information in this table was gathered from the most recent Building Condition Survey that was completed by the districts’ architects.

<b>Table 4.1 Overview of District Buildings</b>				
	Schenevus		Worcester	
Buildings	School	Bus/ Maintenance Garage	School	Bus Garage
Address	159 Main St. Schenevus, NY 12155	159 Main St. Schenevus, NY 12155	198 Main St. Worcester, NY 14822	Hollanbeck Rd. Worcester, NY 12197
Year of Original Building	1940	2004	1932	2010
Sq. Ft. in Current Building	92,118	17,940	106,687	7,812
Number of Floors	2	1	3	1
Grades Housed	Pre-K-12	-	Pre-K-12	-
Students Served	339	-	332	-
Architect	James Jordan Associates		Scott Duell	

As can be seen from table 4.1 above, both school buildings are between 80 and 90 years old. On the other hand, each district has a bus garage that has been built fairly recently. The Worcester school building is slightly larger than the Schenevus school. Schenevus houses 339 students compared with the 332 students in Worcester. Both

buildings have multiple floors, Schenevus with two floors and Worcester with three floors.

The next area for analysis is to determine the current usage of the rooms in each of the school buildings. This analysis is not exact. A standard classroom in New York State is approximately 770 square feet. In looking at the classroom usage in these two districts, rooms are called classrooms where they approximate 770 square feet. It should be clearly understood that some of the classrooms in the following table are slightly smaller than 770 square feet and some are slightly larger. Tables 4.2 and 4.3 that follow show the current utilization of the two school buildings.

<b>Table 4.2</b> <b>Utilization of Schenevus Central School-2019-20</b> <b>Building Has a Gym, Cafetorium, Library, and Offices that are Independent of the Count of Rooms Below</b>			
# of Full Size Classrooms	# of Core Academic Classrooms (20)	Other Usage of Full Size Classrooms (17)	Usage of Smaller Rooms, Not Full Size, Other than Administration, Guidance, Nurse, Storage, Custodian, and Other Offices
37	Pre-K-1 K-1 1-2 2-1 3-1 4-1 5-1 RTI Math-1 RTI-ELA-1 English-2 Social Studies-2 Math-2 Science-3 Spanish-1	Special Ed-1 Basic Life Skills-2* Study Hall-1 Speech-1 Resource Room-2 Art-2 Music-1 Band-1 OT-1 Superintendent's Office-1 Spare-4	PT-1 Resource-2 Distance Learning-1
*Class being closed in 2020-21			

<b>Table 4.3</b> <b>Utilization of Worcester Central School-2019-20</b> <b>Building Has a Gym, Cafeteria/Gym, Auditorium, Library, and Offices that are</b> <b>Independent of the Count of Rooms Below</b>			
# of Full Size Classrooms	# of Core Academic Classrooms (20)	Other Usage of Full Size Classrooms (14)	Usage of Smaller Rooms, Not Full Size, Other than Administration, Guidance, Nurse, Storage, Custodian, and Other Offices
34	Pre-K-1 K-2 1-1 2-1 3-2 4-1 5-1 6-2 English-2 Social Studies-2 Math-2 Science-2 Spanish-1	Elementary RTI-1 Special Ed/RTI-2 Special Ed-4 Elementary Counselor-1 Business-Home Ec-1 STEM-1 Art-1 Music-1 Band-1 Copier Room/ISS-1	Speech-1 Conference Room-1 Elementary Principal-1 Faculty Room-1

From the two tables above, it is clear that, while the Worcester school building is larger than the Schenevus building, the districts have approximately the same number of full size classrooms. One other observation of note is that Schenevus has four full size classrooms that are currently vacant and are used as spares.

New York State is committed to ensuring that its children go to school in buildings that are safe and appropriate for delivering a 21<sup>st</sup> century education. For that reason, all school districts are required to have a Building Condition Survey completed every five years. This Building Condition Survey identifies current issues in the buildings and forecasts issues that may occur in these buildings. Not every item that is identified in the Building Condition Survey needs to be addressed immediately. Clearly some items are of greater importance than others. Understanding that not all of the items identified in a Building Condition Survey are of high priority, the following table 4.4 shows the estimated cost of the items identified in the 2015 Building Condition Survey for each district.

<b>Table 4.4 Items Identified as in Need of Attention from the 2015 Building Condition Survey</b>	
Schenevus	
Repave parking lots*	\$325,940
New sidewalks*	50,000
Replace access control system*	30,000
Window upgrades*	611,750
Replace wood flooring*	63,317
Ceiling tile replacement*	200,000
Lighting replacement*	758,952
Replace piping*	12,500
Hot water heater replacement*	16,768
Replace plumbing fixtures*	350,452
Replace boiler burners*	71,000
Replace HVAC unit in Cafetorium*	200,000
Replace HVAC controls*	375,597
Replace fire alarm system*	312,984
Replace exit lighting system*	20,000
Worcester	
Roof replacement*	\$460,000
Install electric vehicle station	15,000
Add CO detection system*	15,000
Add battery back-up for exterior lighting*	26,000
*All items addressed in recent capital project	

In examining the data presented in table 4.4 above, it is important to update the status of those items identified in the 2015 Building Condition Survey. In 2018, Schenevus completed a \$6,519,976 capital project that addressed all of the items identified in its BCS. Worcester has addressed all of its identified items except the installation of an electric vehicle station. The next BCS for Schenevus is scheduled for 2023 while Worcester has its next BCS in 2021. Given the ages of the buildings and the item from the 2015 BCS in Worcester, it is clear that both districts have school buildings that, for older facilities, are in very good condition. It is also the case, as with all older school buildings, that future projects will take place in both districts. Neither district currently has an overwhelming amount of work to complete.

Earlier in this report, it was noted that the schools are, in many ways, the center of these two communities. This is further evidenced by the way the communities use their

school facilities. Table 4.5 that follows shows the significant way that the communities use their school buildings.

<b>Table 4.5 Use of School Buildings by Community Groups</b>	
Schenevus	Worcester
<ul style="list-style-type: none"> <li>✓ Little League</li> <li>✓ District alumni</li> <li>✓ Indoor soccer</li> <li>✓ Cub scouts</li> <li>✓ Girl scouts</li> <li>✓ Youth basketball</li> <li>✓ Youth soccer</li> <li>✓ AAU Basketball</li> <li>✓ Fire department</li> </ul>	<ul style="list-style-type: none"> <li>✓ Boy Scouts of America</li> <li>✓ Clark Sports Center</li> <li>✓ Cole All Star Circus</li> <li>✓ Eastern New York Youth Soccer Association</li> <li>✓ Girl Scouts of NYPENN Pathways</li> <li>✓ New York State Public High School Athletic Association &amp; Its Member Sections</li> <li>✓ People of the State of New York &amp; the State University of NY</li> <li>✓ Soccer Association for Youth</li> <li>✓ Tri Valley League Association</li> <li>✓ Worcester Alumni Association</li> <li>✓ Worcester PTO</li> <li>✓ Worcester Sports Booster Club</li> <li>✓ Worcester Youth Recreation Commission</li> </ul>

**It is assumed that, should an annexation occur, all of the current athletic teams would continue in the merged district. It is also quite possible that additional teams could eventually be formed.**

The final consideration for this chapter is to examine the athletic facilities that are currently used by the districts. Table 4.6 that follows shows the athletic teams that are currently in place in the districts as well as the number of student participants on each team. The two school districts are currently sharing

their modified baseball team and their boys and girls track teams. It is assumed that, should an annexation occur, all of the current athletic teams would continue in the merged district. It is also quite possible that additional teams could eventually be formed.

Table 4.6 Athletic Participation-2019-20		
FALL SPORTS		
	Schenevus	Worcester
Girls Modified Soccer	14	19
Boys Modified Soccer	18	13
Girls Varsity Soccer	21	20
Boys Varsity Soccer	17	19
Boys Varsity Cross Country	5	
Girls Varsity Cross Country	3	
WINTER SPORTS		
Girls Modified Basketball	15	14
Boys Modified Basketball	7	12
Boys JV Basketball	6	9
Girls JV Basketball	2	7
Girls Varsity Basketball	12	9
Boys Varsity Basketball	9	13
SPRING SPORTS		
Varsity Baseball	20	14
Modified Baseball*	9	
Varsity Softball	15	17
Modified Softball	15	
Boys Varsity Track*	15	
Boys Modified Track*	6	
Girls Varsity Track*	12	
Girls Modified Track*	4	
*Sports teams shared between Schenevus and Worcester		

Each school district currently has a gymnasium, a baseball field, a softball field, and a soccer field. Worcester has a second gym that also serves as a cafeteria. In addition, both districts have an outdoor basketball court. Worcester also has a tennis court on its campus.

Now that the current utilization of the two school district facilities has been identified, the second major consideration with respect to facilities is exploring the available space and how it might be used should a merger occur. Understanding the use of the buildings as seen in tables 4.2 and 4.3 makes it clear that, should a merger occur, neither of the school buildings is large enough or has the capacity to house all of the merged district’s students. In addition, the two districts have agreed upon the shared belief with respect to the use of facilities:

*The BOE understands the value to keep both school buildings open. It is understood that the Schenevus school building will be needed for educational programming in the foreseeable future. Therefore, provide the means for the Schenevus school and community to name the Schenevus school building to reflect the role it will play in educating students.*

The grade structure of the current two school districts is an issue that will have to be addressed should a merger occur. Schenevus has a Pre-K-5 elementary school, a 6-8 middle school, and a 9-12 high school. Worcester has a Pre-K-6 elementary school and a 7-12 junior-senior high school. The new district will have to make a decision about the location of the middle grades. For purposes of this study, it will be assumed that the current Worcester structure of a Pre-K-6 elementary school and a 7-12 junior-senior high school will be maintained.

Given these factors, consideration must be given to how the grades and the students will be assigned should a merger occur. In considering this question, the student enrollment of the individual districts and of a merged district are examined. Table 4.7 that follows shows the historical enrollments in grades K-6 of the two districts.

<b>Table 4.7 Historical Enrollments in Grades K-6</b>			
<b>Academic Year</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Total</b>
2014-15	190	174	364
2015-16	185	170	355
2016-17	196	176	372
2017-18	192	180	372
2018-19	178	180	358
2019-20	156	164	320

As can be seen in Table 4.7, the elementary school enrollments in both districts were very stable from 2014-2019 but dropped significantly in 2019-20. Table 4.8 that follows shows the historical enrollments of the junior-senior high school enrollment for the two districts.

<b>Table 4.8 Historical Enrollments in Grades 7-12</b>			
Academic Year	Schenevus	Worcester	Total
2014-15	153	168	321
2015-16	160	150	310
2016-17	166	156	322
2017-18	160	152	312
2018-19	156	147	303
2019-20	167	153	320

Table 4.8 above shows that, while Schenevus has increased slightly and Worcester has decreased slightly, the historical enrollments in grades 7-12 for the two districts have been very stable.

In addition to considering the historical enrollment patterns of the districts, it is also appropriate to look at the projected enrollments for the future. Table 4.9 that follows provides that projection.

<b>Table 4.9 Combined Enrollment Projections 2020-21 to 2026-27</b>							
	Year						
	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
K-12 Total	634	629	621	627	625	607	605
K-6	317	314	317	321	328	334	340
7-12	317	315	304	306	297	273	265

As can be seen in Table 4.9, the enrollment in grades K-6 is expected to increase from 317 in 2020-21 to 340 in 2026-27 school year. This represents an increase of 23 students. At the same time that the K-6 enrollment is expected to increase, the 7-12 enrollment is projected to decrease from 317 students to 265 students over the same period of time. This is a decrease of 52 students at the secondary level. Combined, the merged district’s enrollment is projected to decline from 634 to 605 students.

The Worcester school building has nearly 107,000 square feet while the Schenevus building has approximately 92,000 square feet. High schools require more square footage than elementary schools in order to accommodate classrooms for required classes in the middle school, science labs, athletic facilities, and other related activities. Also, Worcester has two gyms with one also serving as a cafeteria; however, this room

can serve as a second gym for practices and games. Finally, Worcester is located in a vibrant village setting which would allow students to access local stores should the district decide to provide an open campus. As a result, it would appear that the Worcester building would be better equipped to house the 7-12 junior-senior high school while Schenevus would be the appropriate location for the Pre-K-6 elementary school.

Given the initial predisposition for the location of the buildings, it is now important to analyze whether or not the grade levels will fit in the buildings. The major consideration in analyzing whether or not there is room for certain grades in a building is to examine the student enrollment. Table 4.10 that follows is the first point of analysis.

<b>Table 4.10 Common Branch Classrooms Needed in Merged Elementary School</b>				
School Year	Actual/ Projected Enrollment	# of Classrooms Needed with 18 Students Maximum*	Add 2 Pre-K Classrooms	Total # of Classrooms Needed
2019-20	311			
2020-21	317	18	2	20
2021-22	314	18	2	20
2022-23	317	18	2	20
2023-24	321	18	2	20
2024-25	328	19	2	21
2025-26	324	18	2	20
2026-27	340	19	2	21
*Assumes an equal distribution of students across all grades K-6				

Table 4.10 above shows that combined K-6 enrollment for the merged district. 2019-20 enrollment is actual enrollment; the rest of the years are projections. In determining the number of common branch classrooms that would be necessary to house this elementary student population, it was assumed that there would be an equal distribution of students across the grade levels, K-6 and that no class would have more than 18 students. After providing two classrooms for the Pre-K programs currently located in Schenevus and Worcester, it is projected that a maximum of 21 classrooms would be needed over the next seven years as seen in table 4.10. Now that the number of classrooms has been projected, it must be determined whether or not sufficient rooms exist in Schenevus to house the elementary school program.

Table 4.11 that follows identifies the rooms in the Schenevus school that would be used to house the Pre-K-6 elementary school.

<b>Table 4.11 Existing Rooms to be Used for Merged District Common Branch Classrooms in Schenevus</b>	
Current Rooms	# of Rooms
Pre-K	1
K	1
1	2
2	1
3	1
4	1
5	1
English	2
Social Studies	2
Math	2
Science	3
Spanish	1
Basic Life Skills	2
Study Hall	1
Superintendent’s Office/Classroom	1
Spare	4
<b>TOTAL ROOMS</b>	<b>26</b>

As can be seen in Table 4.11, 26 classrooms would be available to house the 21 classrooms that are needed for the elementary program. Having the flexibility of five “extra” rooms is important so that, if necessary, adjustments can be made for an increase in student enrollment, an unequal distribution of students across the grade levels, or other factors that are not known at this time but might arise as the details of creating this new elementary school are implemented.

Students in grades K-6 all receive services outside of their common branch classrooms. Schenevus has a gymnasium, a cafetorium, and a library to provide space for students to be served in those areas. In addition, Table 4.12 that follows identifies the other full size classrooms that would be used to serve this elementary school population.

<b>Table 4.12 Full Size Classrooms in Addition to 26 Common Branch Classrooms in Schenevus</b>	
Current Rooms	# of Rooms
RTI Math	1
RTI ELA	1
Special Education	1
Speech	1
Resource Room	2
Art	2
Music	1
Band	1
Occupational Therapy	1
<b>TOTAL ROOMS</b>	<b>11</b>

Finally, there are rooms that are smaller than standard elementary school classrooms that are used to deliver services to students. These smaller rooms are identified in Table 4.13 that follows.

<b>Table 4.13 Additional Smaller Classrooms in Schenevus</b>	
Physical Therapy	1
Resource Room	2
Distance Learning	1
<b>TOTAL ROOMS</b>	<b>4</b>

The smaller rooms identified in Table 4.13 will also be available for the elementary program. In addition, the distance learning room is currently used for secondary classes so this room would provide further flexibility for providing a comprehensive elementary program.

Based on the analysis provided, it is clear that the K-6 elementary program would fit in the Schenevus building. In addition, it is the recommendation of the consultants that the Pre-K program be located in the merged district’s elementary building. Pre-K students are most appropriately educated with elementary school students who are approximately the same age. In addition, locating the Pre-K program in the elementary school will allow the Pre-K students to have access to some of the programs that are available to the elementary school children. Also, the Pre-K staff will appropriately be able to jointly develop curriculum and instructional strategies with the elementary staff, an excellent professional development opportunity for all involved. It is therefore quite

clear that the Pre-K-6 program in the merged district should be located in the Schenevus school.

The next question to be addressed is whether or not the secondary program will fit in the Worcester building. Once again, this analysis begins by looking at the student enrollment that will be inhabiting this building for the next several years. Table 4.14 that follows examines those enrollment data.

<b>Table 4.14 Actual/Projected Enrollment for Secondary (7-12) Students in Merged District</b>			
<b>School Year</b>	<b>Schenevus 7-12 Enrollment</b>	<b>Worcester 7-12 Enrollment</b>	<b>Total 7-12 Enrollment of Merged District</b>
2019-20	167	153	320
2020-21	158	158	317
2021-22	154	161	315
2022-23	153	150	304
2023-24	150	156	306
2024-25	141	157	297
2025-26	134	139	273
2026-27	128	138	265

Table 4.14 above shows that combined 7-12 enrollment for the merged district. 2019-20 enrollment is actual enrollment; the rest of the years are projections. In determining the number of core academic classrooms that would be necessary to house this student population, it was assumed that the same number of secondary offerings from the 2019-20 school year would continue to be offered in the merged secondary school and that the number of core academic classrooms that accommodated that program in 2019-20 would be sufficient to accommodate the students in grades 7-12 in the merged district. Table 4.15 that follows shows the number of core academic classrooms that existed in both districts for grades 7-12 for the 2019-20 school year.

<b>Table 4.15 Core Academic Classrooms for Grades 7-12 in 2019-20</b>			
Core Academic Area	# of Classrooms in 2019-20 in Schenevus	# of Classrooms in 2019-20 in Worcester	Total # of Classrooms in 2019-20
English	2	2	4
Social Studies	2	2	4
Math	2	2	4
Science	3	2	5
Spanish	1	1	2
Total Rooms	10	9	19

Table 4.15 shows that Schenevus and Worcester dedicated 19 classrooms to offering their secondary program in 2019-20. Based in the assumption that the same program would be delivered in the same classrooms, it must be determined whether or not the Worcester building can house the 7-12 program. Tale 4.16 that follows identifies the rooms in the Worcester school that would be used to house the 7-12 core academic program.

<b>Table 4.16 Existing Rooms to be Used for Merged District Secondary (7-12) Classrooms in Worcester</b>	
Current Rooms	# of Rooms
Pre-K	1
K	2
1	1
2	1
3	2
4	1
5	1
6	2
English	2
Social Studies	2
Math	2
Science	2
Spanish	1
Business/Home Economics	1
Elementary RTI	1
Special Education/RTI	2
Elementary Counselor	1
<b>TOTAL ROOMS</b>	<b>25</b>

As can be seen in Table 4.16, 25 classrooms would be available to house the 19 classrooms that are needed for the core academic secondary program. As was mentioned with the elementary school space allocation, flexibility at this early part of the potential merger process is important but it does appear that Worcester could accommodate the 7-12 core academic program. In addition, it should be noted that this is a very conservative projection for two reasons. First, current low enrolled sections of courses will be combined in a merged secondary school so the number of sections will probably be less, even if some electives are added to the program. This means that fewer classrooms will be needed. Second, the projected enrollment decline of 55 secondary students has not been factored into the utilization of these classrooms.

Students in grades 7-12 also receive services outside of their core academic classrooms. Worcester has a gymnasium, a cafeteria that is also used as a second gymnasium, an auditorium, and a library to provide space for students to be served in those areas. In addition, Table 4.17 that follows identifies the other full size classrooms that would be used to serve this junior-senior high school population.

<b>Table 4.17 Full Size Classrooms in Addition to 25 Core Academic Classrooms in Worcester</b>	
<b>Current Rooms</b>	<b># of Rooms</b>
Special Education	4
STEM	1
Art	1
Music	1
Band	1
Copier Room/ISS	1
<b>TOTAL ROOMS</b>	<b>9</b>

Finally, there are rooms that are smaller than standard secondary classrooms that are used to deliver services to students. These smaller rooms are identified in Table 4.18 that follows.

<b>Table 4.18 Additional Smaller Classrooms in Worcester</b>	
Speech	1
Conference Room	1
Elementary Principal	1
Faculty Room	1
<b>TOTAL ROOMS</b>	<b>4</b>

Given the analysis and discussion in this chapter, it is clear that Schenevus has the room to house the Pre-K-6 program and that Worcester has the room to house the 7-12 program for the merged district. As a result, it is the recommendation of the consultants that, should the districts decide to merge, the Pre-K-6 elementary school should be located in Schenevus and the 7-12 secondary school should be located in Worcester.

The recommendation that is being made for the location of the classrooms in a merged district is also compatible with the location of athletic facilities currently located in both districts. Each school district currently has a gymnasium, a baseball field, a softball field, and a soccer field. In addition, both districts have an outdoor basketball court. Worcester also has a tennis court on its campus and a cafeteria that can double as a gymnasium that can be used as an athletic practice facility. More athletic activities occur at a junior senior high school than do at an elementary school. The tennis courts in Worcester as well as the second gymnasium make the Worcester building more conducive to housing a junior-senior high school. This is not to say, however, that all interscholastic athletic activities will be taking place in Worcester. Schenevus has excellent athletic facilities as well and these facilities will undoubtedly be used to house a more comprehensive athletic program than currently exists at the varsity and modified levels. Only basketball currently has junior varsity competition. However, the current program will have the opportunity to expand with the merger and demand for athletic facilities will increase. As a result, the athletic facilities in both Schenevus and Worcester will be used. The decision about which teams will play and practice in each community is best left to the district staff to decide.

Whether or not the districts decide to merge, there is capital work that will need to be accomplished with the districts' facilities. These items will include previously

identified items from the Building Condition Surveys as well as enhancements that the communities will want to make to their buildings. The state of New York believes in providing appropriate school facilities for its students. Because the cost of capital construction is so large that local school districts would find it nearly impossible to finance these projects on their own, the state provides funding in the form of Building Aid in order to help local school districts finance these building projects. The current Building Aid ratio for Schenevus is 84.0% while the Building Aid ratio for Worcester is 84.3%. This means that the state reimburses Schenevus \$0.840 and Worcester \$0.843 on every dollar spent for approved building project expenses. The state has to approve which expenses will be eligible for Building Aid but once that determination has been made, the state Building Aid ratio kicks in. When school districts merge, a significant financial incentive exists for capital construction. For new construction, the state will enhance the higher of the former districts' Building Aid ratio by an additional 30%, up to a maximum of 95% of all approved capital costs and up to 98% for high needs districts. Both Schenevus and Worcester are high needs districts so the 98% maximum aid for approved expenditures is appropriate. To detail this calculation, Worcester, having the higher aid ratio, would be 84.3% X an additional 30% ( $84.3\% \times 30\% = +25.3\%$ ) for a total aid ratio of 109.6%. However, the maximum aid ratio available is 98% so 98% would be the new Building Aid ratio for a merged district for a ten-year period. This means that, as an incentive for the merger, any new approved capital construction in a merged district would be aided by the state at 98%. This incentive exists for a period of ten years from the official date of the merger. If the districts decide not to merge, this 98% reimbursement from the state would not be available to the individual districts; Schenevus would remain at its reimbursement rate of 84.0% and Worcester would remain at its reimbursement rate of 84.3%. The enhanced reimbursement rate of 98% for capital construction is only available if the districts merge.

Given the complexities of planning for and implementing a long range facilities plan, it is recommended that, should a merger occur, a facilities advisory committee be formed to help guide the district. A new Building Condition Survey of the district's facilities will be required after the merger and should provide a very clear itemization of the facilities needs of the merged district. This information will have to be considered in light of the 98% Building Aid ratio that will be available to the merged district for a

period of ten years after the merger. Another factor to be considered is that neither district has a significant reserve for capital projects; as of June 30, 2019, Schenevus had \$0 and Worcester had \$68,030 in their capital reserves. All of these factors must be considered in building and implementing a long-term facilities plan that will best serve the students and the communities of the merged district. Further discussion of this topic will take place in the Finance chapter.

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**All factors must be considered in building and implementing a long-term facilities plan that will best serve the students and the communities of the merged district.**

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## Chapter 5 Student Transportation

This chapter will present an overview of the transportation operation in each of the two study districts. It is important to keep in mind that the location and organization of the schools, as well as geographic factors, are major determinants in how the transportation routing is arranged.

### *Schenevus Central School District*

Schenevus operates its own bus fleet under the supervision of the Transportation Director. The district uses a five-year bus replacement schedule which keeps all vehicles within the five-year warranty period. For routine maintenance, the district contracts for one day per week of service from Leonard Bus Sales. Should a mechanical emergency arise, the current Transportation Director previously served the district as a head mechanic and is, therefore, able to provide immediate support. The table below summarizes the current transportation fleet the district owns.

<b>Table 5.1 Summary of Transportation Fleet for Schenevus</b>					
Bus #	Year	Condition	Capacity	Model	Current Mileage*
95	2016	Good	24 / 3 WC	GMC Thomas	38,770
96	2015	Good	65	IC/CE	55,427
97	2016	Good	66 / 3 WC	IC/CE	30,350
98	2016	Good	7	Chevrolet Traverse	31,388
99	2017	Good	65	IC/CE	24,281
100	2017	Good	65	IC/CE	29,342
101	2018	Good	65	IC/CE	20,882
102	2019	New	65	IC/CE	7,891
103	2019	New	65	IC/CE	6,834
85	2009	Fair	6	Dodge Caravan	140,219
NOTES: *mileage as of March 2020; list does not include maintenance and other vehicles the district owns.					

The district is on a bus replacement schedule that calls for the purchase of one or two new buses each year. As the table illustrates, this permits the district to keep its fleet in very good condition.

Schenevus employs a single trip bus system to get students to and from school each day with the afternoon run conducted in the reverse of the morning routes. Table

5.2 shows the number of regular bus runs the district uses daily as well as route times, number of passengers and miles covered. The longest time any student is on the bus is 75 minutes, but that is one outlier with all other routes clocking in at 60 minutes or less. The 75 minute route a function of one student’s residence that was surrounded by seasonal roads so the only bus access was by a circuitous route that significantly extended the riding time. That student graduated in June 2020 so the route is under 60 minutes in 2020-21.

<b>Table 5.2 Regular Bus Runs for Schenevus</b>								
Bus #	First Student Pickup	A.M. Run Ends	Longest A.M. Riding Time (minutes)	P.M. Run Starts	Last Student Dropoff	Longest A.M. Riding Time (minutes)	# of Passengers	Miles Covered*
85 Out of district	7:40	8:30	50	1:40	2:30	50	4	89
95 In district	7:14	7:50	36	3:00	3:32	32	16	27
96 Out of district	8:10	9:00	50	11:00 A.M.	12:00	60	31**	49
97 In district	6:55	7:50	55	3:00	4:00	60	57	49
98 Out of district	7:00	9:00	120	1:15	3:15	120	3	85
99 In district	6:50	7:50	60	3:00	3:55	55	53	50
100 In district	6:51	7:50	59	3:00	4:15	75	37	75
102 In district	6:55	7:50	55	3:00	3:52	52	59	60
103 In district	6:56	7:50	54	3:00	3:48	48	38	52
NOTES: *Total miles for the day; **BOCES runs combined Schenevus (16) and Worcester (15). Times and daily mileage may vary.								

In 2019-20, the district also sent buses to locations outside the district including ONC BOCES campuses, Springbrook, and Oneonta High School. Transportation requirements for students attending educational programs outside of district boundaries will likely vary year to year depending on students’ needs. The district’s transportation facility was built in 2004 and is in very good condition.

*Worcester Central School District*

Worcester also operates its own transportation program. The district is on a five-year bus replacement program which enables the buses to remain under the five-year warranty period. Worcester employs 1.5 bus maintenance staff members to provide all routine vehicle maintenance. The following table summarizes the current fleet. Worcester generally plans to replace two buses annually.

<b>Table 5.3 Summary of Transportation Fleet for Worcester</b>					
Bus #	Year	Condition	Capacity	Model	Current Mileage*
76	2014	Fair	35	IC	105,114
78	2016	Good	65	IC	41,467
79	2015	Good	28	Chevrolet Trans Tech	48,621
80	2017	Good	65	IC	38,106
81	2017	Good	65	IC	44,502
82	2017	Good	24 / WC	Chevrolet Trans Tech	7,497
83	2018	Good	65	IC	23,603
84	2019	Good	65	IC	15,518
85	2018	Good	65	IC	21,088
86	2020	New	65	IC	10,951
C-19	2009	Fair	4	Chevrolet Impala	
C-20	2013	Fair	6	Dodge Van	165,665
C-21	2015	Fair	6	Dodge Van	98,423,
C-22	2016	Good	6	Chevrolet Traverse	39,445
C-23	2017	Good	6	Dodge Van	35,159
C-24	2020	New	7	Chevrolet Traverse	1,390
NOTES: *Mileage as of March 2020; list does not include maintenance and other vehicles the district owns.					

Like Schenevus, Worcester transports students to and from school daily using a single trip bus pattern. Table 5.4 below shows the number of regular daily bus runs the district uses as well as route times, number of passengers and miles covered. The longest time any student is on the bus is 60 minutes for an in-district run.

<b>Table 5.4 Regular Bus Runs for Worcester</b>								
Bus #	First Student Pickup	A.M. Run Ends	Longest A.M. Riding Time (minutes)	P.M. Run Starts	Last Student Dropoff	Longest A.M. Riding Time (minutes)	# of Passengers	Miles Covered*
76 (Squirrel) Out of District	6:40	Varies		Varies	4:20		9	100
80 (Turtle) In district	6:52	7:52	60	3:08	4:02	54	59	55
81 (Frog) In district	6:53	7:53	60	3:08	3:52	54	36	54
83 (Dino) In district	6:47	7:50	63	3:08	3:42	34	47	52
85 (Bear) In district	6:58	7:50	52	3:08	3:46	38	50	55
86 (Eagle) In district	7:07	7:55	48	3:08	3:39	31	57	37
C-22 Out of district	6:19	Varies		1:30	3:40	Varies	2	224
BOCES A.M.	8:00	8:05	5				15**	10
BOCES P.M.				11:00 AM***	3:00	Bus takes students to BOCES and remains on campus until dismissal	31**	40
NOTES: *Total miles for the day; **BOCES runs combined Schenevus (16) and Worcester (15); Times and daily mileage may vary.								

In 2019-20, Worcester transported students to out-of-district academic programs at ONC BOCES – Milford Campus, ONC BOCES – Grand Gorge Campus, Pathfinder Village, and Cobleskill-Richmondville Central School. Transportation requirements for students attending educational programs outside of district boundaries will likely vary year to year depending on students’ needs. Worcester operated late bus runs for the CROP (Creating Rural Opportunities Partnership), a grant-funded program that is centered around youth development, academic support, and family engagement, in 2019-20 until schools were forced to transition to virtual learning as a result of the pandemic. The program is still operating virtually but once full in-person instruction and extracurricular activities return, the late bus runs will be re-established. Schenevus does not have the fiscal capacity to offer late bus runs. If the districts merge, the further development of late bus runs could be an enhancement that might allow more students to participate in after-school activities.

An important consideration of parents when a merger is being considered is how long their children, particularly the young ones, will have to be on a bus to get to and from school each day. While this can be influenced by many variables (location of schools, number of bus routes, single versus double trip route patterns, etc.), the state recommends that one hour should be the maximum desired time students should be on a bus going to or from school. From a transportation perspective, the distance between the two school buildings is less than 5 miles or approximately 6 minutes of riding time.

The transportation supervisors from Schenevus and Worcester have conferred and concluded that, following a merger of the districts, it would be feasible to develop bus routes that would ensure no student would be on a regular day, in-district bus run for more than one hour ten minutes. This maximum ride time is based upon continuation of existing bus routes with the implementation of a shuttle system to deliver the Schenevus attendance area students in grades 7-12 to the Junior-Senior High School in Worcester and the Worcester attendance area students in grades Pre-K-6 to the Schenevus school building. No additional school buses would be needed to implement this plan. Another possible option for delivering students to the appropriate building in a merged district might be to simply extend the regular bus routes to service both buildings. Based on the current grade level enrollment and conservative estimates, it would take three (3) buses from each current district to shuttle the students. Given that each district has a total of five (5) in-district routes, it would also be possible to have students remain on the same bus that provides service to/from home for a relatively small additional cost. Additional costs related to transporting students between buildings would be eligible for state Transportation Aid at approximately 90% of expense. Regardless of whether the regular bus route or shuttle option is implemented, a cost analysis should include wages and related benefit costs for additional driver time, additional fuel and bus maintenance, and state Transportation Aid. A simple analysis of estimated additional local costs for each option follows.

**Cost Estimate – 3 Shuttle Buses AM/PM**

- 185 school days x 3 buses x 2 times daily x 1 hour/day x 2 buildings (12 daily driver hours) = 2,220 annual hours
- 2,220 x \$15/hour (est) = \$33,300
- \$33,300 + 35% fringe benefits = \$44,955
- $\$44,955 \times 10\% \text{ local cost} = \$4,496$
- 185 school days x 3 buses x 2 times daily x 10 miles RT x 2 buildings (120 miles/day) = 22,200 annual miles
- 22,200 x \$1.65/mile = \$36,630

$\$36,630 \times 10\% \text{ local cost} = \$3,663$

**Total estimated local cost: \$8,159**

**Cost Estimate – 5 Regular Route Buses AM/PM**

- 185 school days x 5 buses x 2 times daily x 1 hour/day x 2 buildings (20 daily driver hours) = 3,700 annual hours
- 3,700 x \$15/hour (est) = \$55,500
- \$55,500 + 35% fringe benefits = \$74,925
- $\$74,925 \times 10\% \text{ local cost} = \$7,493$
- 185 school days x 5 buses x 2 times daily x 10 miles RT x 2 buildings (200 miles/day) = 37,000 annual miles
- 37,000 x \$1.65/mile = \$61,050

$\$61,050 \times 10\% \text{ local cost} = \$6,105$

**Total estimated local cost: \$13,598**

To summarize, transportation for students in a merged district:

- can be provided for a nominal additional local expense.
- would result in a very slight increase in bus riding time for most students.

- may provide some students with reduced riding time depending on the location of his/her residence.
- would not require the acquisition of any new buses.
- would not require significant change to current systems since both districts use single-trip routing and have a fleet of vehicles of the same manufacturer and similar age.

Both districts have transportation facilities that have been recently renovated. As noted above, both districts are on five year vehicle replacement plans which keeps their fleets in excellent condition, generally requiring only routine preventive maintenance. Most vehicles are able to be garaged which improves operational reliability during the winter months. Should the districts choose to merge, both facilities would continue to operate in the short term. However, the transportation office and bus maintenance operations should be centralized in one facility for efficiency.

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**The transportation supervisors from Schenevus and Worcester have conferred and concluded that, following a merger it would be feasible to develop bus routes that would ensure no student will be on a regular day, in-district bus run for longer than one hour and ten minutes.**

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## Chapter 6 Staffing

Education is a labor-intensive business. School districts routinely spend 70-75% of their operating budgets on salaries and fringe benefits for the people who work in their schools. As school districts contemplate a merger, consideration of the staffing needs of the merged district is important. This chapter of the report examines the current staffing in both districts as well as the staffing implications should a merger occur. This analysis examines teaching, administrative, and support staff.

Prior to analyzing staffing data for this potential merger, it is important to review the impact that annexation has on staffing. The statement of shared values that have been agreed to by both boards of education state as follows with respect to staffing:

*All employees are valued. As such, the BOE will discuss the means to provide employment for as many staff members as possible. Strategies, such as utilizing retirements and attrition will be used to accomplish this goal.*

This means that, should an annexation occur, as many current staff members as possible from both districts will be members of the staff of the merged district as of July 1, 2022. Worcester teachers will retain all of their rights while a State Education Department document addresses the rights of the Schenevus teachers when it says, “for salary, sick leave and any other purposes, the length of service credited in the annexed district shall be credited as employment time with the annexing district.” Therefore, it appears that all the unclassified staff who come to the newly merged district will come with all of the rights accrued that they had in their previous district.

School district staffing is generally made up of instructional staff, support staff, and administrative staff. Table 6.1 that follows shows the staff that are currently employed by the two study districts.

<b>Table 6.1 District Positions</b>		
Position	Schenevus	Worcester
<b>Instructional/Instructional Support</b>		
Teacher	32	39
Teacher/Library Aide	12	7
Teaching Assistant	6	4
Nurse	1	1
<b>Buildings &amp; Grounds</b>		
Superintendent of Buildings & Grounds	1	-
Building Maintenance Mechanic II	-	1
Building Maintenance Mechanic	-	1
Cleaner	2	4
Maintenance	1	-
<b>Cafeteria</b>		
Cook/Cafeteria Manager	1	1
Food Service Worker/Helper	2	4
<b>Transportation</b>		
Bus Driver	4	6
Head Bus Driver/Part Time	-	1
Bus Driver/Cleaner	2	-
Bus Driver/Mechanic	1	1
Bus Driver/Maintenance	2	-
Mechanic	-	1
Bus Monitor		2
<b>Administrative/Supervisory Support</b>		
K-12 Principal/Director of Special Ed	1	-
Principal-Elementary		1
Principal-Secondary		1
Superintendent	1	1
Student Support Service Coordinator		1
Network Specialist/Tech Coordinator	1	1
Secretary	3	3
Treasurer		1
Treasurer, Deputy	1	
<b>TOTAL STAFF</b>	<b>74</b>	<b>82</b>

As is evident from table 6.1 above, the majority of staff in these two school districts are teachers. Teachers, teacher aides, and teaching assistants comprise approximately 2/3 of the districts’ staff. This is not at all unusual since the primary purpose of schools is to educate the students who attend those schools. The other observation that can be made by looking at this table is that, while no two districts are

alike in the way they staff their schools, the number of positions and the types of positions are quite similar between Schenevus and Worcester.

In a school district merger by annexation, the annexing district’s board of education stays in place to serve the newly merged school district. In addition to the board of education, the contracts and policies of the annexing district will also stay in place until appropriately modified. In consideration of the Schenevus teachers becoming members of the newly merged district, one of the tasks that will have to be accomplished after the annexation is to define salary and benefit levels for the Schenevus teachers. As a result, teacher contracts from the two districts have been compared.

The table that follows is a comparison of the major provisions in the teacher contracts in Schenevus and Worcester. Not every clause was compared. This analysis looked only at the major provisions in the contracts. In providing this review of the collective bargaining agreements and noting their many similarities, we recognize that there are important differences in these contract provisions. However, it is our opinion that negotiation of these matters for defining Schenevus teacher benefits in a merged school district could be accomplished without major difficulty. Table 6.2 comparing some of the major contract provisions follows.

<b>Table 6.2 Teacher Contract Comparison</b>		
<b>Item</b>	<b>Schenevus</b>	<b>Worcester</b>
Duration	July 1, 2014-June 30, 2020	July 1, 2017-June 30, 2021
Recognition	Professionally certified staff of teachers including long term subs and part-time teachers	Full and part time teachers, teaching assistants, and long term substitutes who serve a semester or more
Grievance Procedure	Binding arbitration	Binding arbitration
Health Insurance	NY 44 Plan-District pays 94% of individual premium and 85% of family premium	CASEBP Plan N-District pays 95% for individual coverage and 85% of family coverage
Health Insurance Buyout	\$1,875/year	\$1,000 for individual and family coverage
Dental Insurance	Excellus BC/BS dental plan with the employees paying the full premium	District pays 100% for individual coverage and 39% for family coverage
Life Insurance	District provides a plan with a face value of \$10,000	-
Flexible Spending	Yes-IRS Section 125 Plan	Yes-IRS Section 125 Plan
Sick Leave	12 days/year, cumulative to 250 days	11 days/year, cumulative to 220 days
Sick Leave Bank	Yes	Yes
Personal Leave	3 days/year for personal business; unused days accumulate as sick days	3 days/year for personal business; unused days accumulate as sick days
Sabbatical	No	May be granted to teachers with at least

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		6 years of service in the district
Masters Degree	-	1,090
Association Business		2 days/year for thee Association president to attend the NYSUT Representative Assembly
Workday	8:00-2:45	Maximum of 7 hours and 10 minutes
Work Year	180 days per year	-
Teaching Conditions	All teachers have one 40 minute block of free time/day	Teachers teach a maximum of 6 periods/day with 2 prep periods/day
Employment Conditions	No teacher shall be arbitrarily discharged	Tenured teachers shall only be dismissed for good reason as defined by NYS Education Law
Termination Payments	With 15 years of service, \$25/day of unused sick leave for the first 150 days; \$35/day of unused sick leave for each day after 150 days up to a maximum of 250 days	With 20 years of service: -\$10,000 cash payment, plus: -payment for unused sick days at the rate of \$80/day to a maximum of 200 days -maximum payments of \$26,000  If teacher does not qualify for benefit above, teacher receives the following: -\$30/day if accumulated sick leave is 50-149 days; -\$42/day if accumulated sick leave is 150-199 days; -\$47/day if accumulated sick leave is 200-220 days
Retiree Health Insurance	-15 years of service-district pays \$1,250 toward premium of single plan (94% if retirement occurs in the 1 <sup>st</sup> year of eligibility) -20 years of service-district pays 33% of premium cost for single plan (50% if retirement occurs in the 1 <sup>st</sup> or 2 <sup>nd</sup> year of eligibility) -25 years of service-district pays 40% of premium cost for single plan -30 years of service-district pays 50% of premium cost for single plan (80% if retirement occurs in the 1 <sup>st</sup> or 2 <sup>nd</sup> year of eligibility)  Family Plan-1 <sup>st</sup> year-District pays 94% of half the cost of the premium; thereafter, district pays 80% of half the cost of the premium  At age 65, district pays 100% of retiree's Medicare Part B premium	With 10 years of service, district pays 60% for individual coverage and 40% for family coverage  If a retire selects only individual coverage, the district pays 70% of the premium cost

Schenevus and Worcester compensate staff in the teacher bargaining units in a fairly common manner. Both districts have a traditional teacher salary schedule/grid that is structured with years of service (steps) and payment for graduate hours earned (columns). Determining a staff member's years of service and graduate hours will

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identify an intersection on this salary grid that will allow one to identify the salary paid to that individual. Table 6.3 that follows compares the salary schedules of the two districts at selected steps and columns.

<b>Table 6.3 Teacher Salary Schedule Comparison-2019-20*</b>		
	Schenevus	Worcester
B-Step 1	41,160	38,658
B-Step 5	43,920	41,387
B-Step 10	47,343	43,940
B-Step 15	50,767	48,366
B-Step 20	54,254	53,424
B-Step 25	59,630	58,758
B-Top Step	77,253 (40)	58,758 (25)
M-Step 1	44,169	41,128
M-Step 5	47,207	43,857
M-Step 10	51,005	45,960
M-Step 15	54,883	50,836
M-Step 20	58,810	55,894
M-Step 25	64,166	61,228
M-Top Step	82,464 (40)	61,228 (25)
M+30-Step 1	46,322	42,508
M+30-Step 5	49,537	45,237
M+30-Step 10	53,606	47,790
M+30-Step 15	57,779	52,216
M+30-Step 20	61,949	57,274
M+30-Step 25	67,318	62,608
M+30-Top Step	86,075 (40)	62,608 (25)
*Assumes a Master's Degree is achieved at 30 graduate hours and \$46/credit hour; ( ) is the highest step in that column;		

In Table 6.3, B is the comparison of teacher salaries with a Bachelor's Degree, M is for teachers who have a Master's Degree, and M+30 is a comparison of salary steps for  
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teachers who have acquired 30 graduate hours beyond their Master's Degree. Steps represent years of service. As can be seen from table 6.3, the Schenevus salaries are higher than the Worcester salaries at all of the steps that were compared. In addition, the Schenevus salary schedule has many more steps than the Worcester schedule resulting in significantly higher salaries for the most experienced teachers. This comparison is not at all unusual when looking at the salary schedules of two school districts. Negotiations in New York State are conducted in each school district. Each board of education negotiates with its bargaining units and ends up with collective bargaining agreements, none of which are the same from one school district to another. Subsequent to the annexation, however, it will be up to the board of education and the teacher union to negotiate a satisfactory way of defining salaries and benefits for all teachers as part of the newly merged school district.

Should a merger occur, the Schenevus teachers will fall under the Worcester teacher contract. While the settlement of a successor agreement will inevitably occur, consideration of Schenevus teacher salary and benefit provisions will make these negotiations somewhat complicated. While all teachers will eventually be compensated on a single salary schedule, salary negotiations will be influenced by a number of factors including the length of the teacher day, insurance benefits, leave provisions, the number of periods taught, etc. In short, there is no way to predict what the eventual salary schedule in the merged district will be.

There is no state statute or regulation that determines the level at which the teacher contract in an annexation must be negotiated with respect to salary. Labor and management are free to negotiate a salary schedule that is similar to, higher than, or lower than the existing salary schedule in Schenevus or Worcester. However, in districts that have merged in New York State, there has traditionally been a "leveling up" process that takes place with regard to teacher salaries. That is, teachers in the lower paying of the merged districts, in this case Worcester, have their salaries "leveled up" to the higher district salary schedule, in this case Schenevus. In some cases, this happens in the first year of the new contract. In other cases, this salary and benefit "leveling up" happens over a period of years.

In discussing the concept of leveling up teacher salaries, it is clear, and it must be remembered, that there is no requirement to level up any salaries. It is also clear that in

past mergers in the state, merged districts have consistently used some formula across some timeline for leveling up teacher salaries. Having acknowledged this parameter for leveling up, we are most cognizant of the fact that previous leveling up of salaries has taken place in an economic environment that was very different than the one that school districts face today. There have been only five mergers in the past fifteen years so the history of leveling up practices in this challenging economy is fairly thin. However, because we have estimated cost savings due to this merger in a conservative manner, we have included the cost of leveling up teacher salaries as a complete level up in the first year of the merger, also a very conservative approach.

In attempting to analyze the cost of “leveling up” teacher salaries, some basic payroll information was gathered. Analyzing the payrolls results in the following teacher salary comparison in Table 6.4.

<b>Table 6.4</b>				
<b>Average Teacher Salaries</b>				
	Teacher Payroll	Number of Teachers	Average Step*	Average Teacher Salary
Schenevus	1,818,203	32	16.3	56,819
Worcester	2,104,331	39	14.7*	53,957
Average Teacher Salary				55,247
Average Teacher Salary with 58% Fringe Benefits				87,291
*Step for 8 “off step” Worcester teachers determined by their start date with the district.				

The average teacher salary does not always indicate which district has the richer method for compensating its teachers. The years of experience and degrees that the teachers possess may influence the average salary as much or more than the payment methodology itself. In analyzing the teacher salary data for Worcester, there are 7 of the 39 teachers who are “off step.” This means that these teachers are credited with years of experience that exceed the 25 steps in the salary schedule and are compensated at a rate that is higher than the top salary for their particular column. For purposes of calculating the average step for this table, it is assumed that the years of credited service for each teacher are calculated from their hire date with the district. For example, a teacher hired in 2000 would have 20 years of experience in 2019-20 and, for purposes of this calculation, would be placed on step 20.

Table 6.4 does provide some interesting information. For example, we see that there are 32 teachers in Schenevus compared with 39 teachers in Worcester. We also see that the average teacher salary for Schenevus is approximately \$3,000 higher in Schenevus than it is in Worcester. This is due to the facts that the teacher salary schedule in Schenevus is higher than the schedule in Worcester and that the number of years of experience for the average teacher in Schenevus is 1.6 years greater than the average teacher in Worcester.

The districts were asked to provide a calculation for the cost of fringe benefits for their employees. In Schenevus, fringe benefits were approximately 58% of total salaries and in Worcester, fringe benefits represented 55% of salary costs. Because the percentages are similar and because estimating in a conservative manner is best in a study, 58% will be used for the cost of fringe benefits. This means that the cost for the average teacher's salary and benefits across both districts is approximately \$87,291.

In analyzing teacher salary data and the cost of "leveling up" teacher salaries, a decision was made that the Worcester teachers could be "leveled up" to the Schenevus salary schedule. In calculating the cost of leveling up the Worcester teachers to the Schenevus schedule, the step and degree level was determined for each Worcester teacher. Using this information, each Worcester teacher was then placed on the Schenevus salary schedule according to that step and education level. Next, the longevity payments that the Worcester teachers receive were added in to determine an equivalent salary on the Schenevus schedule. The result of this exercise was that moving the Worcester teaching staff to the Schenevus salary schedule would result in a payroll of \$2,229,865. This is \$125,535 higher than Worcester's existing payroll of \$2,104,331 for its 39 teachers.

In addition to the salary impact, we have estimated the increase in fringe benefit costs due to leveling up to be approximately 35%. This is less than the 58% fringe benefit cost noted earlier because the cost of health insurance does not change as salaries are increased. This adds another \$43,937 for increased fringe benefit costs. As a result, the total cost of salaries and related fringe benefits for leveling up the Worcester teachers to the Schenevus salary schedule is \$169,472. These calculations can be summarized in Table 6.5 that follows.

<b>Table 6.5 Cost to Level Up Teacher Salaries</b>	
2019-20 Worcester teacher payroll	\$2,104,331
Payroll of 2019-20 Worcester teachers placed on Schenevus salary schedule	\$2,229,865
Salary cost of leveling up Worcester teachers to Schenevus salary schedule	\$125,535
Fringe benefits estimated at 35% (no insurances)	\$43,937
<b>Total cost of salaries and benefits to level up teacher salaries</b>	<b>\$169,472</b>

Throughout this study, there will be scenarios examined and questions addressed regarding the costs that will be incurred by adding teachers or the costs that might be saved by eliminating or not filling teaching positions. For purposes of this study, we will use the payroll information contained in Table 6.4 for calculating the cost of a teacher. We will use the average salary for a teacher across the two districts and an estimated fringe benefit cost of 58% to calculate this cost. As a result, the average cost of a teacher for purposes of this study will be \$87,291.

In Chapter 3 dealing with the instructional program offered to students, elementary school staffing patterns were examined based on the number of elementary sections used. Table 6.6 that follows shows the 2019-20 elementary structure for both districts.

<b>Table 6.6 Elementary Sections/Section Sizes 2019-20</b>		
Grade Level	Schenevus	Worcester
Pre-K	10	13
Kindergarten	16	14, 12
1 <sup>st</sup> Grade	12, 11	13
2 <sup>nd</sup> Grade	16	24
3 <sup>rd</sup> Grade	18	13, 15
4 <sup>th</sup> Grade	26	20
5 <sup>th</sup> Grade	26	25
6 <sup>th</sup> Grade	18 (MS)	16, 16
<i>Total Number of Sections w/o Pre-K</i>	<i>8</i>	<i>10</i>
<i>Total Number of Students w/o Pre-K</i>	<i>143</i>	<i>168</i>
<i>Average Section Size w/o Pre-K</i>	<i>17.9</i>	<i>16.8</i>

As can be seen in table 6.6, there were 18 sections of K-6 classes in the two districts, 8 in Schenevus and 10 in Worcester.

Also in chapter 3, a projection was made as to the number of elementary sections needed should the districts merge and move all elementary classes into one building.

Table 6.7 shows that projection.

<b>Table 6.7</b>	
<b>Projected Elementary Section Sizes in Merged District</b>	
<b>22 Students Maximum in Primary and 26 Students Maximum in Intermediate</b>	
Grade Level	Merged District
Pre-K	n/a
Kindergarten	21, 21
1 <sup>st</sup> Grade	18, 18
2 <sup>nd</sup> Grade	20, 20
3 <sup>rd</sup> Grade	15, 15, 16
4 <sup>th</sup> Grade	23, 23
5 <sup>th</sup> Grade	26, 25
6 <sup>th</sup> Grade	25, 25
<i>Total Number of Sections w/o Pre-K</i>	<i>15</i>
<i>Total Number of Students w/o Pre-K</i>	<i>311</i>
<i>Average Section Size w/o Pre-K</i>	<i>20.7</i>

The projection in table 6.7 assumes that no primary grade section would be larger than 22 students and that no intermediate section would be larger than 26 students. Both of these projected limits are consistent with current district enrollments for those grade levels. Comparing tables 6.6 and 6.7, the merged district with a single elementary school could educate all of the elementary students with 15 sections or classrooms, three fewer than the number of 18 sections that are currently used in the two districts. This means that three fewer classrooms and three fewer teachers would be needed in the merged district's elementary school.

With the merged district having three fewer classrooms and three fewer teachers in the elementary school, savings could be realized. It is customary in this study to estimate savings in a conservative manner. As a result, no savings are projected for teacher aides, teaching assistants, or any other position title other than the three teachers in the three classrooms. It has been determined that the average cost for an average teacher's salary and benefits is \$87,291. Therefore, the ability to reduce three elementary teaching positions would save the merged district \$261,873 in elementary teaching staff salaries and benefits. The statement of shared values states that these reductions in staff should be accomplished through attrition.

Also in chapter 3, we determined that by using a maximum class size of 22 students for middle and high school classes, approximately 20 sections of middle school and high school classes could be reduced. This analysis is shown in Table 6.8 that follows.

<b>Table 6.8 Number of Middle and High School Section Reductions By Subject Area (Maximum of 22 Students Per Regular Section)</b>		
	<b># Of Section Reductions</b>	<b>@ 80%</b>
English	2	1
Social Studies	4	3
Math	6	5
Science	4	3
Spanish	3	2
Business	0	-
Technology	1	1
Music	0	-
Art	1	1
Home & Career Skills	1	1
<b>Total</b>	<b>22</b>	<b>17</b>

The question that arises from examining this data is whether or not staffing efficiencies can be realized from reducing the number of sections of classes offered, again remembering that the statement of shared values suggests that any staff reductions will be made only through attrition. In looking at this question, it must realistically be noted that scheduling is never 100% efficient. Accommodating BOCES schedules, low enrollment classes, special area classes, and other complications preclude the development of a perfect schedule. Therefore, the table shows that the scheduling of a merged junior-senior high school could be accomplished at a level of 80% efficiency, thereby adding the third column to table 6.8.

Analyzing this table 6.8 provides some insight into the possible reduction of teaching positions. Generally speaking, teachers in the two study districts teach 5-6 classes per day. Applying this teaching load to the table above, it appears that it might be feasible to conservatively eliminate one teaching position, mostly probably from the math area because it is the only area where five or more periods of instruction appear to be freed up. Using \$87,291 as the cost of a teacher, it is conservatively estimated that a merged district could save approximately this amount in secondary teaching staff by

having maximum class sizes of 22 students at the junior-senior high school level. This would also allow the addition of a number of new courses that would enhance opportunities for the students.

Now that the extent of teacher reductions through attrition has been identified, it is important to examine whether or not this will realistically have an impact on the financial operation of the merged district. Since all staff reductions will presumably be accomplished through attrition, table 6.9 that follows shows the teacher attrition that has occurred over the past five years in the two districts.

<b>Table 6.9 Teacher Attrition</b>		
<b>Year</b>	<b>Schenevus</b>	<b>Worcester</b>
2019-20	Spanish Social Studies Special Education (2) Music (2)	Elementary (3) Music Social Studies
2018-19	Elementary Math Speech Pathologist Library Media Specialist	Special Education
2017-18	Library Media Specialist Spanish	Elementary (2) Social Studies Special Education
2016-17		Guidance Counselor
2015-16	Elementary Business Music	Art Special Education Elementary (2) Physical Education English
5 Year Total	15	18

As can be seen from table 6.9 above, 33 teachers have left the employment of these two school districts in the past five years, an average of 6.6 teachers resigning per year. While resignations will never occur in a neatly planned manner, if staff reductions through attrition are going to occur, it appears that this is a realistic projection for financial savings. Therefore, for purposes of this study, it will be assumed that savings from elementary teacher salaries and benefits will be approximately \$261,657 and savings from secondary teacher salaries and benefits will be approximately \$87,291 for a total teacher savings of \$348,948.

Stipends for coaches were next examined. Schenevus and Worcester have maintained a fairly comprehensive set of athletic offerings for their students, given that both districts are relatively small districts. Table 6.10 that follows shows the stipends that are paid to the coaches in these sports.

<b>Table 6.10</b>		
<b>Coaching Stipends-2019-20</b>		
<b>FALL SPORTS</b>		
	Schenevus	Worcester
Girls Modified Soccer	916-1,099	1,748
Boys Modified Soccer	916-1,099	1,748
Girls Varsity Soccer	2,003-2,404	3,995
Boys Varsity Soccer	2,003-2,404	3,995
Boys Varsity Cross Country	2,003-2,404	-
Girls Varsity Cross Country	2,003-2,404	-
<b>WINTER SPORTS</b>		
Girls Modified Basketball	1,317-1,580	2,497
Boys Modified Basketball	1,317-1,580	2,497
Boys JV Basketball	2,291-2,749	4,994
Girls JV Basketball	2,291-2,749	4,994
Girls Varsity Basketball	2,519-3,023	5,993
Boys Varsity Basketball	2,519-3,023	5,993
<b>SPRING SPORTS</b>		
Varsity Baseball	2,003-2,404	3,745
Modified Baseball*	-	-
Varsity Softball	2,003-2,404	3,745
Modified Softball	916-1,099	1,623
Boys Varsity Track*	-	-
Boys Modified Track*	-	-
Girls Varsity Track*	-	-
Girls Modified Track*	-	-
*Sports teams shared between Schenevus and Worcester		

The consolidating of inter-scholastic athletic programs in a merged school district is an activity that is often met with mixed emotions. On the positive side, economies can be realized through the elimination of duplicate coaching positions as sports teams are consolidated. In addition, there are often opportunities to create additional sports teams in which the students can participate. In particular, it is noted that the only junior varsity teams in either district are in basketball. On the other hand, the competition for the students to compete on a meaningful basis also increases. This usually results in fewer students having meaningful playing time in a number of the traditional sports.

Based on the data in table 6.10, it appears that the stipends paid to coaches are similar enough and of little enough overall consequence that, should the districts merge, negotiating coaching stipends would not present a major obstacle. The number of athletic teams that the merged district would sponsor would, in all probability, increase. Savings could be realized by the combination of some of the current teams and the resultant reduction in the number of coaches needed. On the other hand, there may be new athletic teams created by the merged district resulting in the need for more coaches. Based on the magnitude of the financial implications in this study, leveling up of coaching salaries, elimination of duplicate sports/coaching salaries, and the start-up of new sports or teams, it is concluded that the magnitude of these actions would be negligible. For this reason, no savings is projected for the combination of the districts' athletic teams.

The same analysis was undertaken with respect to the stipends paid to advisors of clubs and other co-curricular activities. Given the large and complex nature of a school district, the stipends paid to advisors of clubs and other extra-curricular activities are fairly insignificant. While there are differences in the stipends paid to advisors in Schenevus and Worcester, we believe that, should a merger occur, negotiating equitable stipends for advisors of extra-curricular activities would not be terribly difficult to accomplish. There might be opportunities to reduce costs which are currently incurred by the two study districts by reducing the number of advisors that are necessary should some of these activities be merged. However, it is also very common for merged districts to add extra-curricular activities should student interest indicate. This is a fairly easy thing to do. It is most likely that these insignificant cost reductions and cost additions will cancel each other out. For these reasons, no additional costs or savings are included in this study for extra-curricular activities.

As mentioned earlier, staffing has a significant impact on the cost of operating schools. A merger study is not the venue for doing a position-by-position staffing analysis. Whether a merged school district should have one fewer teacher aide, one fewer cleaner, or one more bus monitor is well beyond the scope of this study. However, there are some areas that can be identified as centers for cost savings should a merger occur. These areas will now be discussed.

We turn first to the analysis of the administrators currently employed by both districts. Schenevus and Worcester both have a superintendent of schools as their chief

executive officer. Table 6.11 that follows shows the supervisory positions that report to the superintendent in both districts.

<b>Table 6.11 Administrative/Supervisory Positions</b>		
Position	Schenevus	Worcester
Superintendent	X	X
Superintendent’s Secretary/District Clerk	X	X
Elementary Principal		X
Secondary Principal		X
K-12 Principal/Director of Special Education	X	
Student Support Service Coordinator		X
Director of Transportation-P/T	X	
Head Bus Driver-P/T		X
Director of Facilities-P/T	X	
Building Maintenance Mechanic II-P/T		X
Cafeteria Manager	X	X
District Treasurer	X-0.25	X
School Business Official-BOCES		X
Network Administrator		X

The superintendent of a district which is annexed (Schenevus) would not have rights to the superintendent’s position of the annexing district. However, the Schenevus superintendent’s contract is considered a property right and is therefore a contractual obligation which is binding upon the newly reorganized school district. This right is further evidenced by the Schenevus superintendent’s contract which states as follows:

*When the superintendent of the merged, dissolved, or annexed district has an employment contract, such contract is considered a property right and is therefore a contractual obligation which is binding upon the newly reorganized school district(s) as the successor in interest of the districts which have merged to form the reorganized district (Section 1804(5)(b) of the Education Law.*

It is clear that if the newly reorganized district determines not to employ the Schenevus superintendent, it may discharge its contractual obligation by paying the salary that she would have earned pursuant to her contract. The Schenevus superintendent’s current contract runs from July 1, 2019 through June 30, 2025.

Given all of these legal parameters for the employment of the Schenevus superintendent in a merged district, she is also impacted by the statement of beliefs to “provide employment for as many staff members as possible.” Therefore, while the Schenevus superintendent is free to secure a position elsewhere at any time, if she does

not do so, she is guaranteed a position in the merged district, at least through June 30, 2025, as specified in her current contract. In other merged districts, for example, this former superintendent has been employed as the Assistant Superintendent for the merged district. For purposes of determining the impact of the reduction of one superintendent's position, the assumption is made that both superintendents will be employed in the merged district through June 30, 2025, the expiration date of the current Schenevus superintendent's contract. The average salary and fringe benefit costs at 58% for the two superintendents is \$199,764. This amount will be considered as savings for the merged district as of July 1, 2025, the expiration date of the current contract for the Schenevus superintendent.

In addition to the discussion about the superintendents' positions, the statement of shared values and the facilities chapter in this report have both stated that the Schenevus and Worcester buildings will both remain open. In addition to a Student Support Service Coordinator position in Worcester, the following three principal positions are in place for the 2019-20 school year:

- Schenevus-K-12 Principal/Director of Special Education
- Worcester-Elementary Principal
- Worcester Secondary Principal

In projecting the administrative needs in these areas for a merged district with approximately 630 students, it would not be unreasonable to assume that the Student Support Service Coordinator position would continue. In addition, administrative staffing at the building level could include a full time elementary principal and a full time secondary principal. This would result in one fewer building level administrator position in the merged district compared with the current two districts. The average salary and fringe benefit costs at 58% for the three building principals is \$141,492. This amount will be considered as savings for the merged district as of July 1, 2022.

In addition to the certificated instructional and leadership positions in the districts, there are also staff that provide support to the operation of the schools. Both districts have contracts with these support staff, some in the form of collective bargaining agreements with unions and others in the form of individual contracts. As a result, the contracts are difficult to compare because they are so numerous and so dissimilar.

However, Table 6.11 that follows shows a general overview comparison of the support

staff contracts. Like the teacher contract comparison, not every clause was compared. This analysis looked only at the major provisions in the contracts. While there are clearly differences in the contracts, in many ways the contracts are also quite similar. Table 6.12 comparing some of the major contract provisions follows.

<b>Table 6.12 Support Staff Contract Comparison-2019-20</b>		
<b>Item</b>	<b>Schenevus</b>	<b>Worcester</b>
Affiliation	CSEA	NYSUT
Duration	July 1, 2018-June 30, 2021	July 1, 2017-June 30, 2021
Grievance Procedure	Board of Education is the final stage	Arbitration is the final step
Life Insurance	District provides plan with face amount of \$25,000	-
Sick Leave	10 month-10/year cumulative to 220 11 month-11/year cumulative to 230 12 month-12/year cumulative to 250	10 month-11/year cumulative to 200 12 month-12/year cumulative to 200
Personal Leave	3 days/year	3 days/year
Family Illness	5 days/year	3 days/year
Sick Leave Bank	Yes	Yes
Sick Leave Buy Back	At retirement, \$35/day for all unused sick leave days	At retirement: With 15 years of service-\$45/day With 20 years of service-\$47/day With 25 years of service-\$50/day
Vacation	1 <sup>st</sup> 6 months-5 days 1 year-10 days 5 years-15 days 15 years-20 days	1 <sup>st</sup> 6 months-5 days 1 year-10 days 5 years-15 days 15 years-20 days
Paid Holidays	12 days/year	11 days/year
Salary Increases	2019-20-4% 2020-21-4%	2019-20-3.75% or \$0.70/hour 2020-21-3.75% or \$0.70/hour
Longevity Payments	After 4 years-\$315 After 9 years-\$625	After 10 years-\$518 After 15 years-\$739 After 20 years-\$1,134 After 25 years-\$1,534
Health Insurance	-Individual-District pays 95% -Family-District pays 90% -NY 44 Option B	-Individual-District pays 95% for staff hired before 7.1.2004; 90% for staff hired after 7.1.2004 Family- District pays 80% for staff hired before 7.1.2004; 75% for staff hired after 7.1.2004 CASEBP Plan N
Health Insurance Buy Out	\$2,500/year	\$1,000/year

Retiree Health Insurance	District pays \$2,500/year toward health insurance premium	With 10 or more years of service, district pays 60% for retiree coverage and 40% for dependent coverage
Retirement	After 10 years, 3 regular bi-weekly paychecks or \$3,000	-

As is the case with the teacher contracts, the contracts and policies of the annexing district will stay in place until appropriately modified. In consideration of the Schenevus support staff becoming members of the newly merged district, one of the tasks that will have to be accomplished after the annexation is to define salary and benefit levels for the Schenevus support staff.

Once again, we find that there are differences in the collective bargaining agreements with the support staff unions. However, from the big picture perspective, there do not seem to be any differences that are so significant that concern should be raised. We believe that if a merger were to occur, appropriate accommodations could be made to define the terms and conditions for all support staff in the merged district without significant difficulty.

Finally, an attempt was made to analyze the salaries paid to support staff in Schenevus and Worcester. Unlike the teacher contracts, there is not one salary schedule for support staff in either district that would make a reliable salary comparison possible. As a result, table 6.13 that follows shows a comparison of only the hiring salaries for various support staff positions.

<b>Table 6.13 Hiring Salaries for Support Staff-2019-20</b>		
<b>Title</b>	<b>Schenevus</b>	<b>Worcester</b>
Teacher Aide	18,553 (6 hr/40 min)	11.80
Library Aide		15,629-17,252
Bus Driver	11,485 (2 hr)	7,582-8,370
BOCES Driver		13,043-14,397
Bus Driver/Cleaner	28,129 (8 hr)	27,878-29,881
Bus Driver/Mechanic		21,301-23,513
Building Maintenance Mechanic/Driver	31,324	
Maintenance Person	29,835 (8 hr)	
Food Service Worker	19,479 (8 hr)	
Food Service Helper		11.80
Keyboard Specialist	32,542 (7.5 hr)	14.84-16.38
Assistant Bus/Mechanic/Driver	33,080 (8 hr)	
Head Mechanic		41,430-45,732
Cleaner	26,747 (8 hr)	24,544
Head Custodian	40,486 (8 hr)	
Custodian		24,544-24,833
Licensed Practical Nurse	21,334 (6.5 hr)	
Nurse		32,634-36,023
School Monitor		11.80
Account Clerk/Typist	29,296 (7.5 hr)	

As can be seen from table 6.13, the titles of positions are different in the two districts. Some staff are paid a salary and others are paid an hourly rate. Also, these data only represent only hiring salaries for the districts. Since Schenevus and Worcester are both small districts, staff who work in the positions identified in table 6.11 do a variety of tasks, often doing what is needed to get the job done. For these reasons, comparisons of the support staff salaries are difficult to do in a manner that would result in credible comparisons.

Understanding that support staff comparisons are difficult to accomplish, it is possible that some salary adjustments will occur should the districts decide to merge. However, it is also possible that there can be the elimination of some of the positions identified in tables 6.11 and 6.13....for example, while savings has been calculated for the elimination of one superintendent's position, no analysis of reducing one superintendent's secretary position has been included. It is therefore concluded that any salary adjustments that might be made for support staff will be offset by the elimination

of some support staff positions and, as a result, no savings or increased costs for support staff have been included in this study.

In this chapter, we have discussed the possibility of reducing certain staff positions should the districts decide to merge. The statement of shared values developed by the two boards of education have stated that any staff reduction will be accomplished by attrition. This study projects staffing savings defined as including salaries and fringe benefits for all positions is as follows:

3 elementary teachers @ \$87,291=.....	\$261,873	
1 secondary teacher @ \$87,291=.....	\$87,291	
1 superintendent @ \$199,764=.....	\$199,764	(7.1.25)
1 principal @ \$141,492=.....	<u>\$141,492</u>	
TOTAL SALARY & BENEFITS=.....	\$690,420	

It should be remembered that this is a conservative estimate of savings. It is quite possible that the real savings could exceed those identified in this study.

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**This study projects staff savings for salaries and benefits at \$690,204 following a merger. This is a conservative estimate and real savings could exceed those identified here.**

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## Chapter 7 Finances

In addition to enhancing educational opportunities for students, a second major consideration in any discussion of possible district consolidation involves finances. Therefore, this section of the report will provide an overview of the financial condition of each study district and offer insight into the potential financial ramifications should a merger occur.

As Table 7.1 below illustrates, the residents of both Schenevus and Worcester consistently support annual spending plans put forth by their respective Boards of Education since 2012.

<b>Table 7.1 Budget Vote History</b>								
	<b>Schenevus</b>				<b>Worcester</b>			
<b>Year</b>	<b>% Tax Levy Increase Over Prior Year</b>	<b>Above Tax Cap? (Supermajority required)</b>	<b>Approval Percentage</b>	<b>Budget Approved?</b>	<b>% Tax Levy Increase Over Prior Year</b>	<b>Above Tax Cap? (Supermajority required)</b>	<b>Approval Percentage</b>	<b>Budget Approved?</b>
2010	1.58	N	78.1%	Y	18.46	N	33.7%	N (Contingent budget; no second vote)
2011	1.96	N	63.4%	Y	2.60	N	38.7%	N (Contingent budget; no second vote)
2012	3.18	N	69.8%	Y	1.91	N	61.4%	Y
2013	3.87	N	69.8%	Y	2.00	N	57.0%	Y
2014	2.31	N	76.5%	Y	1.97	N	62.7%	Y
2015	1.13	N	80.7%	Y	1.14	N	74.3%	Y
2016	-0.49	N	84.8%	Y	1.65	N	70.1%	Y
2017	3.69	N	79.2%	Y	1.71	N	78.9%	Y
2018	3.85	N	80.6%	Y	2.00	N	79.9%	Y
2019	4.87	N	64.9%	Y	1.97	Y	75.4%	Y
2020	2.91	N	63.8%	Y	2.17	N	73.3%	Y

Worcester experienced budget defeats in 2010 and 2011 and opted to work with a contingent budget in those years instead of holding a second vote on a modified budget. In 2019, Worcester presented a budget in which the tax levy exceeded the tax cap

requiring a 60% or greater passage rate for approval. The district received 75.4% positive votes so the budget was approved. This is a commendable record of support for school district spending plans that has been shown by both communities.

Examination of each district's general fund balance sheets (Table 7.2) shows that while both districts had similar asset levels, the liabilities for Schenevus are significantly greater than Worcester. This is primarily due to the Revenue Anticipation Note Payable in the amount of \$2,000,000. This Revenue Anticipation Note will be paid in full by June 30, 2021. It is anticipated that a new Revenue Anticipation Note in the amount of \$1,200,000 will be issued on July 1, 2021 but will be repaid by June 30, 2022 leaving a \$0 balance on July 1, 2022 if the districts are merged. The merged district would not assume any of this liability. The fund balances on June 30, 2020 are also notably different. Worcester ended the fiscal year with \$3,213,762 in total fund balance while the Schenevus total fund balance was \$937,420. One area of difference is that of assigned fund balance. Assigned fund balance totals are directly related to budget development practices. Worcester has historically had more funds available at the end of a fiscal year to apply to the future tax levy than has Schenevus as illustrated in Table 7.4. In terms of unassigned fund balances, Schenevus had \$384,371 at year's end while the Worcester unassigned fund balance was \$1,525,378; a significant difference. When comparing these unassigned fund balances with the 2020-21 budget for each district, we find that the Schenevus unassigned fund balance represents 4.0% of its 2020-21 budget while Worcester's unassigned fund balance represents 13.1% of its 2020-21 budget.

<b>Table 7.2: District General Fund Balance Sheets as of June 30, 2020</b>			
	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined</b>
<b>ASSETS:</b>			
Unrestricted/Restricted Cash	\$3,486,376	\$2,378,492	\$5,864,868
Accounts receivable		\$16,238	\$16,238
Due from other funds	\$235,695	\$795,363	\$1,031,058
Due from other governments	\$238,570	\$209,183	\$447,753
State and Federal Aid	\$131,720	\$117,976	\$249,696
Other	\$17,541		\$17,541
<b>Total Assets</b>	<b>\$4,109,902</b>	<b>\$3,517,252</b>	<b>\$7,627,154</b>
<b>LIABILITIES AND FUND BALANCE</b>			
<b>LIABILITIES:</b>			
Accounts payable	\$12,420	\$20,120	\$32,540
Accrued Liabilities		\$3,914	\$3,914
Bonds/BAN/RAN Payable	\$2,000,000		\$2,000,000
Due to other funds	\$353,005	\$19,695	\$372,700
Due to other governments		\$30	\$30
Due to Employee's Retirement Systems	\$34,095	\$41,670	\$75,765
Due to Teacher's Retirement Systems	\$215,971	\$217,932	\$433,903
Unearned Revenue	\$483,333		\$483,333
Deferred Revenue	\$73,658	\$129	\$73,787
<b>Total Liabilities</b>	<b>\$3,172,482</b>	<b>\$303,490</b>	<b>\$3,475,972</b>
<b>FUND BALANCES</b>			
<b>Non-spendable</b>			
<b>Restricted</b>			
Unemployment Reserve	\$66,091	\$76,311	\$142,402
Reserve-Retirement Contributions		\$406,483	\$406,483
Reserve-Property Loss		\$25,638	\$25,638
Insurance Reserve		\$25,638	\$25,638
Reserve-Tax Certiorari		\$10,014	\$10,014
Reserve-Employee Benefits & Accrued Liabilities	\$486,958	\$131,256	\$618,214
Capital Reserve		\$68,044	\$68,044
<b>Total Restricted Fund Balance</b>	<b>\$553,049</b>	<b>\$743,384</b>	<b>\$1,296,433</b>
<b>Assigned</b>			
Appropriated For Taxes		\$945,000	\$945,000
Encumbrances			
Assigned Fund Balance			
<b>Total Assigned Fund Balance</b>	<b>\$0</b>	<b>\$945,000</b>	<b>\$945,000</b>
<b>Unassigned</b>			
Unassigned Fund Balance	\$384,371	\$1,525,378	\$1,909,749
<b>Total Unassigned Fund Balance</b>	<b>\$384,371</b>	<b>\$1,525,378</b>	<b>\$1,909,749</b>
<b>Total Fund Balance</b>	<b>\$937,420</b>	<b>\$3,213,762</b>	<b>\$4,151,182</b>
<b>Total Liabilities &amp; Fund Balance</b>	<b>\$4,109,902</b>	<b>\$3,517,252</b>	<b>\$7,627,154</b>

Fund balance management is a critical part of the fiscal responsibility of the district and is essential to the long-term fiscal health of the district. Total fund balance is comprised of several different categories identified on the district’s balance sheet.

Restricted fund balance consists of monies that have been set aside for a particular purpose as defined by law. Funding and expenditures from restricted fund balance monies have specific regulations and restrictions and are governed by statute. Reserve funds established by districts fall in this category. While utilizing available restricted fund balance differently, both districts have been responsible in establishing reserves to ensure the sound fiscal health of the districts. In terms of future capital project initiatives, Worcester has \$68,044 that will remain in the capital reserve account of the merged district and could be used to fund the local share of any future capital project in the merged district as noted in Table 7.3.

<b>Table 7.3 District Restricted (Reserve) Fund Balances as of June 30, 2020</b>			
	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined</b>
<b>FUND BALANCES</b>			
<b>Restricted</b>			
Unemployment Reserve	\$66,091	\$76,311	\$142,402
Reserve for Retirement Contributions		\$406,483	\$406,483
Reserve for Property Loss		\$25,638	\$25,638
Insurance Reserve		\$25,638	\$25,638
Reserve for Tax Certiorari		\$10,014	\$10,014
Reserve for Employee Benefits & Accrued Liabilities	\$486,958	\$131,256	\$618,214
Capital Reserve		\$68,044	\$68,044
<b>Total Restricted Fund Balance</b>	<b>\$553,049</b>	<b>\$743,384</b>	<b>\$1,296,433</b>

Assigned fund balance consists of monies that are available from the prior year’s budget to be used for a reduction of the district’s tax levy or other related purposes as determined by the Board of Education. Unassigned fund balance represents the level of undesignated funds in the general fund and could report a surplus or deficit. It should be noted that the section 1318 of the Real Property Tax law caps school district unassigned fund balances at 4% of the subsequent year’s budget. As noted below, Worcester’s unassigned fund balance on June 30, 2020 exceeds the statutory limit.

Table 7.4 that follows shows the history of each district’s total fund balance over the past several years. This, too, is a measure of a district’s overall fiscal health. If the

fund balance has remained stable or increased, it typically means that there has been prudent fiscal management. The total fund balance for Worcester has fluctuated over the past five years but has generally trended in a positive direction. However, Schenevus has experienced some fiscal challenges resulting in a significant decline in total fund balance during the first three years of this analysis but has recently been able to restore some of these funds. The unassigned fund balance totals in 2016-17 and 2017-18 are particularly concerning. The unassigned fund balance, monies available to the district in the event emergency unbudgeted expenditures are required, in these years is not at a level that provides fiscal security for the district. Schenevus also had declining restricted fund balance (reserves) in the first three years but, again, has been able to gradually begin to rebuild the reserve balances.

<b>Table 7.4 Analysis of Fund Balance</b>								
	<b>Restricted</b>		<b>Assigned</b>		<b>Unassigned</b>		<b>Total Fund Balance</b>	
	<b>Schenevus</b>	<b>Worcester</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Schenevus</b>	<b>Worcester</b>
2015-16	\$716,790	\$840,924	\$355,485	\$932,414	\$384,731	\$1,100,816	\$1,457,006	\$2,874,154
2016-17	\$663,405	\$1,016,165	\$226,403	\$1,106,813	\$0	\$1,042,232	\$889,808	\$3,165,210
2017-18	\$437,678	\$843,060	\$65,538	\$946,886	\$27,540	\$947,573	\$530,756	\$2,737,519
2018-19	\$267,441	\$793,227	\$117,710	\$904,451	\$285,546	\$1,091,203	\$670,697	\$2,788,881
2019-20	\$553,049	\$743,384	\$0	\$945,000	\$384,371	\$1,525,378	\$937,420	\$3,213,762

We have also reviewed the draft report of the external (independent) auditor for the school year ending June 30, 2020. Schenevus’s auditor is Bonadio & Co., LLC. Worcester employs Bryans & Gramuglia, CPAs, LLC. to conduct its audit. These audits examine the financial health of the districts as well as the practices that the school districts employ to securely manage their funds.

The Schenevus audit report has no recommendations or concerns noted and the Worcester audit report notes only one comment regarding the unassigned fund balance being in excess of the statutory limit. These audits illustrate that there are no concerns with either of the two districts regarding fiscal management of district funds. Both districts have procedures in place that ensure that the public’s money is being well-spent and well-protected. With limited fund balance dollars in Schenevus and the looming

uncertainty of future revenue for all districts, concerns about the fiscal health of the districts are valid.

While the districts are fiscally stable at the fiscal year ending June 30, 2020, it must be understood that school districts are facing extraordinary financial challenges. With the closings of school districts in March 2020 due to the pandemic, some budgeted expenditures were not made. Buildings consumed less electricity, used less heat, and used fewer paper products and maintenance supplies. Buses were not running so no fuel was used and preventative maintenance requirements were far less. Therefore, some of the fund balance increase on June 30, 2020 is directly related to these unexpended dollars. In a typical year, these funds would have been spent, resulting in smaller fund balance totals. Even the best-managed school districts that have set aside reserves continue to be challenged with minimal increases in state revenues and large increases in pension and health care costs. Districts are being forced to eliminate programs and downsize staff. Fund balances are being depleted to finance recurring expenses without being replenished. Studies across the state are projecting the year in which school districts will run out of money. School districts in New York State are facing very turbulent financial futures. These are the very real challenges that are facing both Schenevus and Worcester. While the districts have recently done some good financial planning and are in satisfactory fiscal condition today, the future is challenging at best.

In the 2018-19 school year, Schenevus was identified as a district in 'significant fiscal distress' by the NYS Comptroller's Office resulting from revenue shortfalls in tuition and State Aid, higher than anticipated educational expenses, and depleted fund balances. As a result, Schenevus was legislatively supported for a State Aid 'spin up' that makes State Aid funds available in June instead of October to assist the district with cash flow during the summer months. This advancement is deducted from the district's typical October State Aid payment. The legislation expires at the end of 30 years and the amount of State Aid available for advancement declines by 1/30th of the total each year.

Regional Boards of Cooperative Educational Services (BOCES) provide services to school districts within their geographic region. Both districts are members (component districts) of the Otsego Northern Catskills (ONC) BOCES. ONC BOCES provides educational programs such as Career and Technical Education (CTE), alternative education and special education. Administrative support services and professional

development are also provided by BOCES on a cooperative basis. As an incentive for districts to cooperate and share services through BOCES, the state provides a financial incentive to school districts in the form of BOCES Aid. The BOCES Aid ratio for Schenevus is 70.5% and for Worcester is 70.2%. The table below provides an overview of some of the administrative and program costs that are part of the service contract that each district has with ONC BOCES.



<b>Table 7.5 BOCES Budget 2019-20</b>		
<b>Service</b>	<b>Schenevus</b>	<b>Worcester</b>
Board of Education	\$685	\$500
Business Administration	\$46,639	\$143,979
Purchasing	\$3,912	\$2,500
Personnel/Negotiations	\$30,771	\$28,684
Public Information & Services	\$7,895	
Operation of Plant	\$61,079	\$25,745
Central Printing and Mailing	\$3,000	\$4,500
Central Data Processing	\$23,260	\$51,276
Admin Charge	\$112,336	\$148,374
Curriculum Development		\$500
Research, Planning and Evaluation	\$39,490	\$86,959
Inservice Training - Instruction	\$30,254	
Teaching - Regular School	\$85,041	\$99,138
Programs/Services for Students with Disabilities	\$500,087	\$648,624
Occupational Education	\$353,910	\$273,297
School Library & Audiovisual	\$31,735	\$97,169
Computer Assisted Instruction	\$49,810	
Guidance	\$15,172	
Health Services	\$24,512	\$12,886
Psych Services	\$46,852	\$58,565
Social Work Services		\$500
Athletics	\$27,165	\$2,600
District Transportation Services	\$36,214	\$2,204
Health Insurance Coordination	\$2,126	
<b>Total</b>	<b>\$1,531,945</b>	<b>\$1,688,000</b>

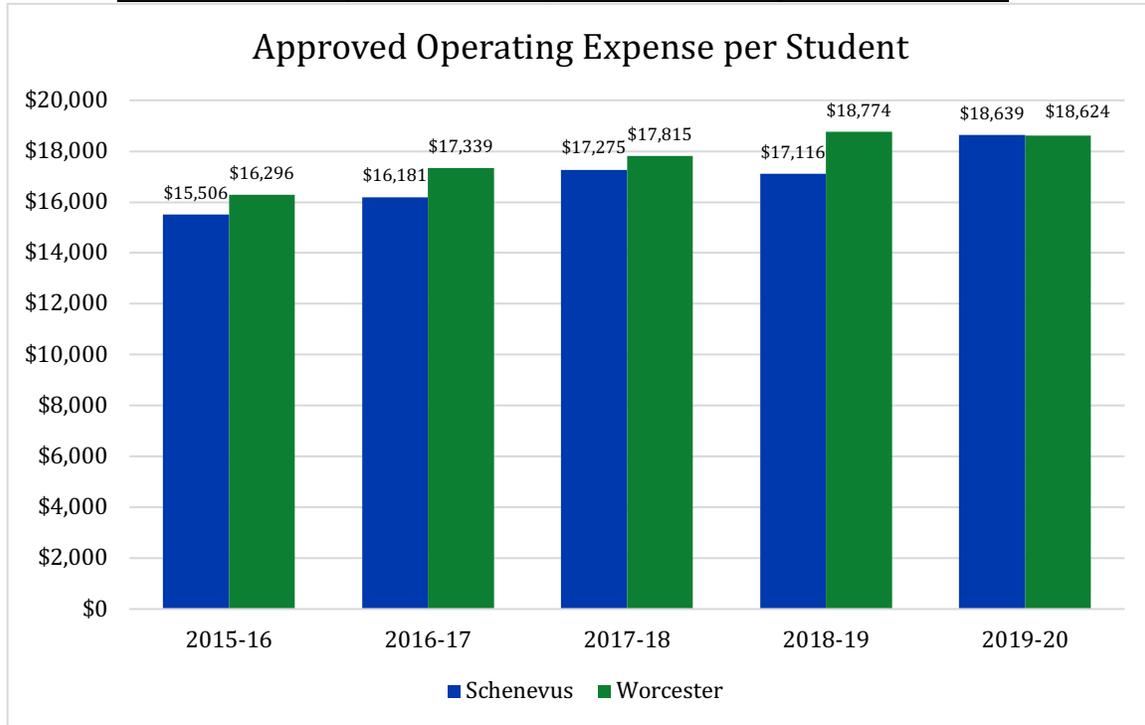
One measure of a district's fiscal condition and its financial commitment to provide a high quality education for its students is the amount of money spent annually. Table 7.6 examines the total approved operating expenses for both districts for the past five years. Approved Operating Expenses (AOE) are those expenses used for the day-to-day operation of the school, excluding certain expenses. Not included are capital outlay and debt service for building construction, transportation of pupils, expenditures made to purchase services from a BOCES, or tuition payments to other districts. Monies received as Federal Aid revenue and State Aid for special programs are also deducted from total annual expenditures when computing Approved Operating Expenses. It is important to note that this amount spent is affected by a number of variables such as regional costs, unique equipment purchases, bus purchases, etc.

<b>Table 7.6</b>			
<b>Approved Operating Expenses</b>			
<b>Year</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined</b>
2015-16	\$5,706,171	\$5,817,558	\$11,523,729
2016-17	\$6,051,702	\$5,895,424	\$11,947,126
2017-18	\$6,512,586	\$6,235,267	\$12,747,853
2018-19	\$6,486,803	\$6,495,851	\$12,982,654
2019-20	\$6,635,579	\$6,481,107	\$13,116,686

This table shows that both districts have increased their approved operating expense over the past five years. The one exception is the 2019-20 Approved Operating Expense for Worcester which decreased by \$14,744 from 2018-19. While there have been some year-to-year fluctuations, the AOE of Schenevus and Worcester is strikingly similar. On average, the Schenevus approved operating expense has increased by approximately 3.3% each year and Worcester has increased by an average of 2.3% annually.

In order to compare school spending between the two districts in a more equitable fashion, Table 7. 7 is presented to examine the approved operating expenses per student.

<b>Table 7.7 Approved Operating Expenses Per Student</b>			
<b>Year</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined</b>
2015-16	\$15,506	\$16,296	\$15,895
2016-17	\$16,181	\$17,339	\$16,733
2017-18	\$17,275	\$17,815	\$17,535
2018-19	\$17,116	\$18,774	\$17,907
2019-20	\$18,639	\$18,624	\$18,632



\*Combined Approved Operating Expenditures for both districts / Combined enrollments of Schenevus and Worcester

As Table 7.7 shows, over the past five years, Worcester’s operating expense per pupil is generally higher than Schenevus’ with the exception of 2019-20. The number of pupils enrolled at Worcester has been slightly less than Schenevus’ enrollment in the past several years which results in a higher Approved Operating Expense per Student when the total expense dollars are similar. The graph illustrates that gap between the per pupil spending of the districts has been virtually eliminated in the 2019-20 school year. There are fixed costs in every school district that cannot be reduced when enrollment declines. Therefore, when fairly static expenditures are divided across fewer students (enrollment declines), the Approved Operating Expense per Student will increase. Given the wide

range of operating expenses per pupil in school districts across the state, the spending levels of these two districts are very similar.

Theoretically, State Aid to education in New York is supposed to help less wealthy districts derive more financial equity with those districts that have greater fiscal capacity. To some degree this occurs. However, the system is not perfect. It is important to examine how much state support each district receives. The table below illustrates the State Aid that Schenevus and Worcester have received over the past five years.

<b>Table 7.8 State Aid</b>			
<b>Year</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined</b>
2015-16	\$4,736,732	\$6,799,962	\$11,536,694
2016-17	\$4,785,397	\$6,817,253	\$11,602,650
2017-18	\$5,027,584	\$6,880,789	\$11,908,373
2018-19	\$5,423,899	\$6,979,695	\$12,403,594
2019-20	\$5,495,689	\$7,002,946	\$12,498,635

As can be seen from Table 7.8, State Aid increased for both districts from 2015-16 to 2019-20. Table 7.8 includes all types of State Aid including Building Aid. Building Aid can fluctuate from year to year and often accounts for a significant amount of the total State Aid and is aid generated for specific capital project expenses previously approved by district voters. Therefore, it is also useful to review the total State Aid for each district minus Building Aid as presented in Table 7.9.

<b>Table 7.9 Total State Aid Without Building Aid</b>			
<b>Year</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined</b>
2015-16	\$4,347,131	\$4,845,163	\$9,192,294
2016-17	\$4,392,396	\$4,853,996	\$9,246,392
2017-18	\$4,606,458	\$4,919,255	\$9,525,713
2018-19	\$4,712,379	\$5,023,015	\$9,735,394
2019-20	\$4,785,903	\$5,046,266	\$9,832,169

While removing Building Aid from the analysis results in a significantly different total aid dollars in Worcester, the exclusion of Building Aid in this analysis does not change the overall State Aid trend in both districts. Without Building Aid, both districts still show some increase in State Aid each year from 2015-16 to 2019-20.

It is also important to examine the amount of State Aid received per student in order to get a more accurate comparison between the two districts. Table 7.10 provides these data.

<b>Table 7.10 State Aid Per Student</b>			
<b>Year</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined*</b>
2015-16	\$12,872	\$19,048	\$15,913
2016-17	\$12,795	\$20,051	\$16,250
2017-18	\$13,336	\$19,659	\$16,380
2018-19	\$14,311	\$20,173	\$17,108
2019-20	\$15,437	\$20,123	\$17,754
*Combined Total State Aid for both districts / Combined enrollments of Schenevus and Worcester			

State Aid per student decreased slightly for Schenevus in the first year of the review period but has increased since. State Aid per student for Worcester has fluctuated but overall has increased slightly over the last five years. Worcester is receiving substantially more Aid dollars per student than Schenevus in this analysis but it is important to remember that Building Aid is included in the data.

Table 7.11 documents the State Aid per enrolled student with the exclusion of Building Aid.

<b>Table 7.11 State Aid without Building Aid per Student</b>			
<b>Year</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined*</b>
2015-16	\$11,813	\$13,572	\$12,679
2016-17	\$11,744	\$14,276	\$12,950
2017-18	\$12,219	\$14,055	\$13,103
2018-19	\$12,434	\$14,517	\$13,428
2019-20	\$13,444	\$14,501	\$13,966
*Combined Total State Aid without Building Aid for both districts / Combined enrollments of Schenevus and Worcester			

In this analysis, the State Aid without Building Aid per student for Schenevus follows the same pattern as shown in Table 7.10. With the exclusion of Building Aid in this table, the Aid per student for Worcester is much more similar to that of Schenevus. In summary, the State Aid without Building Aid per student has increased over the 5-year period for both districts which is a function of slightly more Aid dollars and declining enrollment.

State Foundation Aid to schools is driven in part by the amount of property wealth in a district and the amount of personal income behind each student as compared with the state average. These wealth indices are weighted equally and are called the Combined Wealth Ratio. The district of average wealth in the state has a Combined Wealth Ratio of 1.0. The Combined Wealth Ratio for Schenevus is .510 and it is .539 for Worcester. In the case of both Schenevus and Worcester, this Combined Wealth Ratio is derived by district income wealth and district property wealth that are both below the state average.

Table 7.12 further illustrates the dependence of both Schenevus and Worcester on State Aid as a source of revenue. State Aid revenue represents nearly two-thirds of the total revenue in both Schenevus and Worcester.

<b>Table 7.12 Revenue Sources</b>			
<b>Schenevus</b>			
	State	Local	Total
2015-16	\$4,766,042	\$3,344,755	\$8,110,797
2016-17	\$4,789,584	\$3,287,696	\$8,077,280
2017-18	\$4,980,002	\$3,476,732	\$8,456,734
2018-19	\$5,437,741	\$3,585,203	\$9,022,944
2019-20	\$5,338,002	\$3,746,362	\$9,084,364
Average	59.2%	40.8%	

<b>Worcester</b>			
	State	Local	Total
2015-16	\$6,704,669	\$3,391,788	\$10,096,457
2016-17	\$6,718,352	\$3,990,842	\$10,709,194
2017-18	\$6,809,794	\$3,523,054	\$10,332,848
2018-19	\$6,901,516	\$3,645,219	\$10,546,735
2019-20	\$6,941,713	\$3,724,908	\$10,666,621
Average	65.1%	34.9%	

<b>Combined</b>			
	State	Local	Total
2015-16	\$11,470,711	\$6,736,543	\$18,207,254
2016-17	\$11,507,936	\$7,278,538	\$18,786,474
2017-18	\$11,789,796	\$6,999,786	\$18,789,582
2018-19	\$12,339,257	\$7,230,422	\$19,569,679
2019-20	\$12,279,715	\$7,471,270	\$19,750,985
Average	62.4%	37.6%	

For purposes of this study, we will examine the property wealth of the two districts and illustrate that information in Table 7.13 that follows.

<b>Table 7.13 Full Property Value</b>			
Year	Schenevus	Worcester	Combined
2016-17	\$172,186,238	\$160,391,031	\$332,577,269
2017-18	\$180,288,549	\$170,684,475	\$350,973,024
2018-19	\$191,209,891	\$170,317,005	\$361,526,896
2019-20	\$191,209,891	\$181,665,385	\$372,875,276
2020-21	\$193,026,894	\$175,711,660	\$368,738,554

In examining the full value property wealth data for the two districts, we find that the districts are similar. Both districts have experienced an increase from 2016-17 to 2020-21; Schenevus by 12.1% and Worcester by 9.6%.

We now look at the property value per enrolled student in the following Table 7.14.

<b>Table 7.14 Full Property Value per Student</b>			
Year	Schenevus	Worcester	Combined*
2016-17	\$467,897	\$449,275	\$465,794
2017-18	\$482,055	\$502,013	\$482,769
2018-19	\$507,188	\$486,620	\$498,658
2019-20	\$504,512	\$525,044	\$529,652
2020-21	\$542,210	\$504,919	\$549,536
*Combined Full Property Value for both districts / Combined enrollments of Schenevus and Worcester			

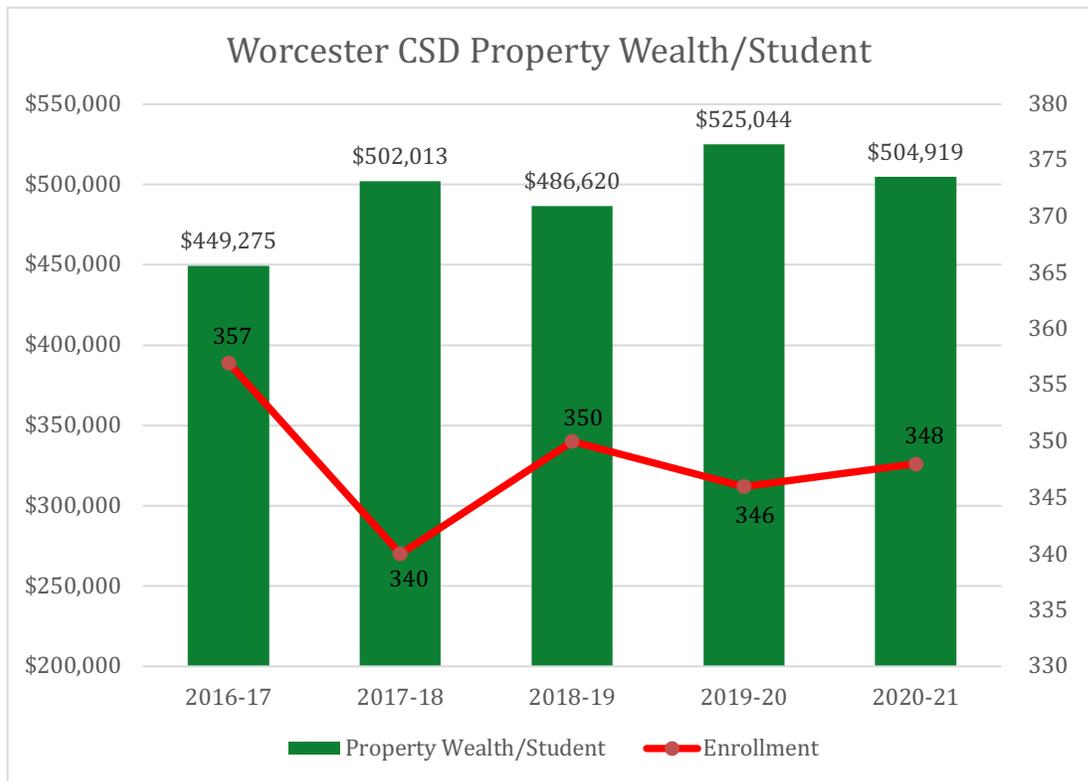
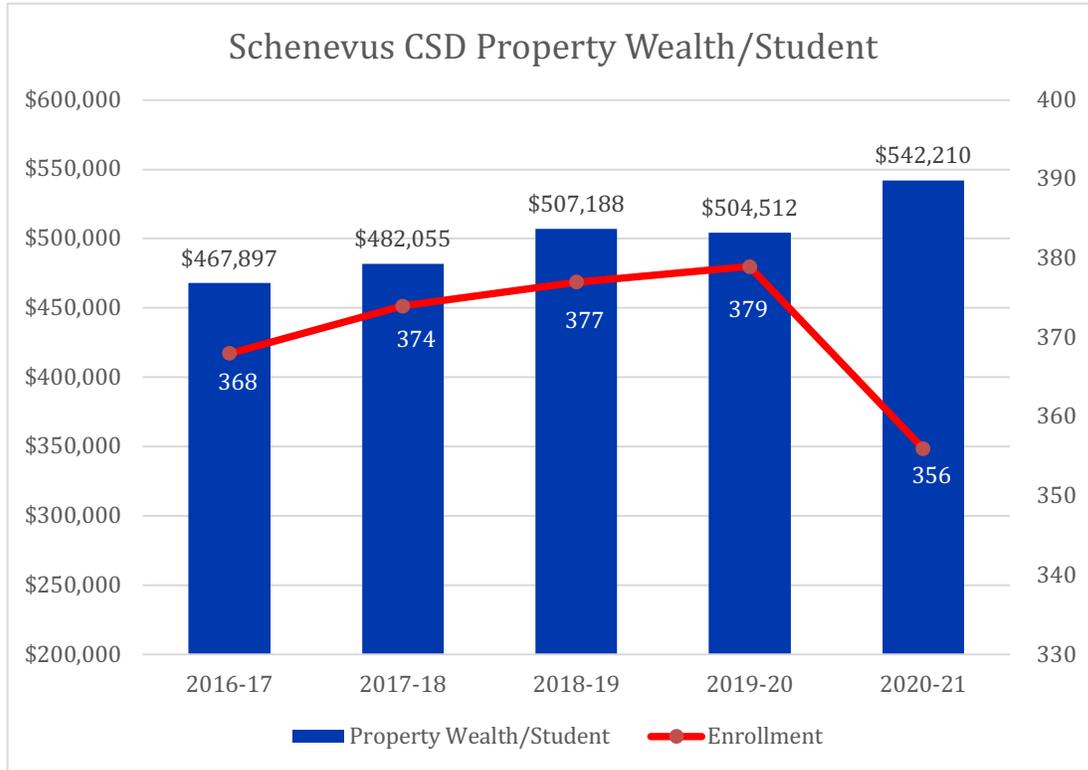


Table 7.14 shows that the property wealth per student in Schenevus has generally increased over the past five years. There are two factors at play here. The property wealth in Schenevus has increased from 2016-17 through 2019-20 while the student enrollment has been relatively level. This results in small increases in the property wealth per student during that period. In 2020-21, the property wealth increased slightly, but the enrollment declined substantially. This enrollment decrease caused the property wealth per students to increase because the property wealth is divided by a smaller number.

Worcester’s property wealth also increased from 2016-17 through 2019-20 but decreased in 2020-21. The fluctuation in student enrollment, however, has a much greater impact on the property wealth per student. When the total property wealth dollars are divided by a smaller number as student enrollment declines, the result is greater property wealth per student. The previous graphs clearly illustrate the relationship between enrollment change and the property wealth per student. This data again illustrates that the districts are very similar.

We now look at the property tax levy for each of the districts in the following, Table 7.15.

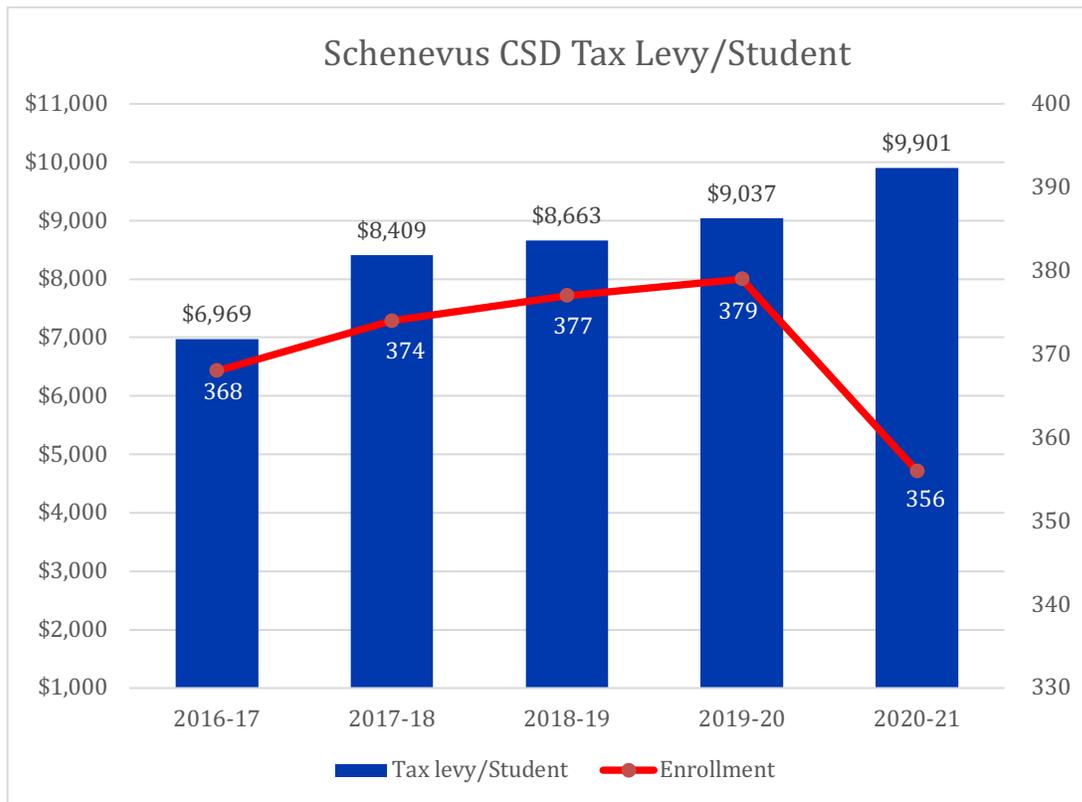
<b>Table 7.15 Property Tax Levy</b>			
<b>Year</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined</b>
2016-17	\$3,033,021	\$3,221,251	\$5,785,989
2017-18	\$3,145,040	\$3,276,444	\$6,421,484
2018-19	\$3,266,010	\$3,341,972	\$6,607,982
2019-20	\$3,425,065	\$3,407,809	\$6,832,874
2020-21	\$3,524,889	\$3,481,809	\$7,006,698

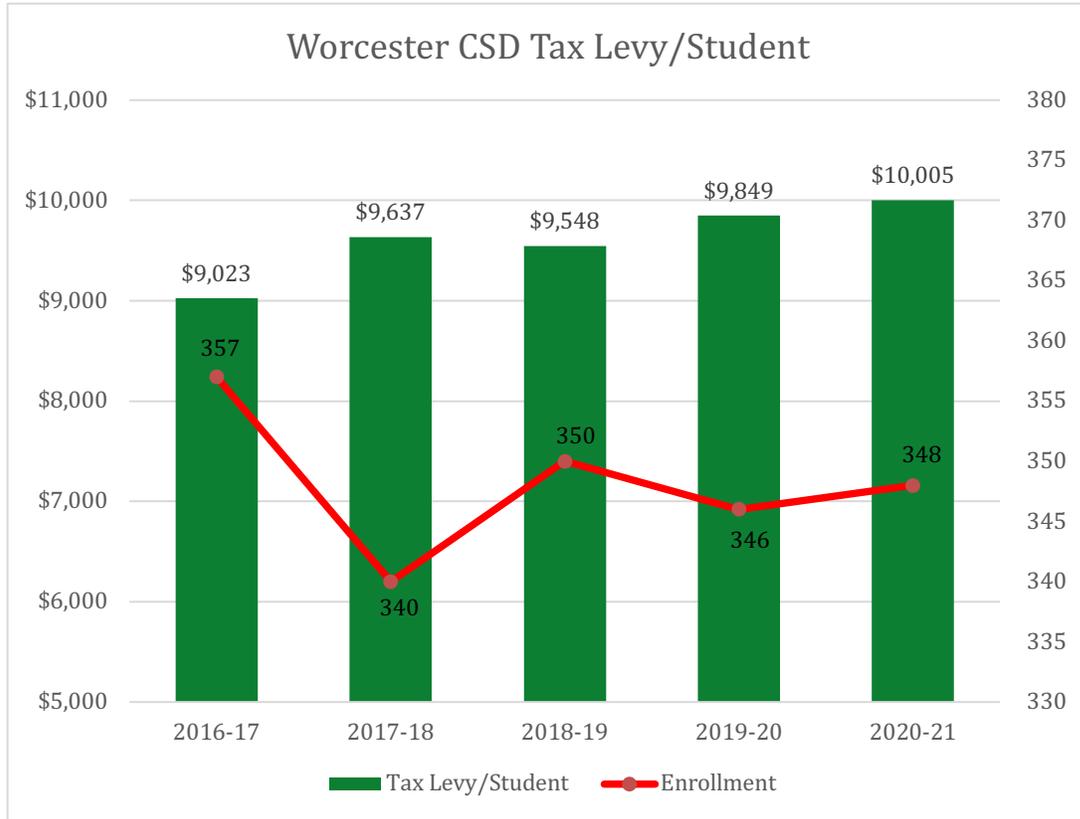
The tax levy for both Schenevus and Worcester has increased in each of the past five years. For Schenevus, the average annual tax levy increase over this five-year period was 3.0% while the Worcester property tax levy increased by an average of 1.6% over the same period.

Table 7.16 shows the tax levy per student for the two districts.

<b>Table 7.16 Property Tax Levy per Student</b>			
<b>Year</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined*</b>
2016-17	\$8,242	\$9,023	\$8,104
2017-18	\$8,409	\$9,637	\$8,833
2018-19	\$8,663	\$9,548	\$9,114
2019-20	\$9,037	\$9,849	\$9,706
2020-21	\$9,901	\$10,005	\$10,442
*Combined Property Tax Levy for both districts / Combined enrollments of Schenevus and Worcester			

In looking at the tax levy per student, we notice that these data have consistently increased in both Schenevus and Worcester (with the exception of 2018-19). While the tax levy in both districts has generally increased, the property tax levy per student will be much greater when enrollment declines because the total levy dollars are being divided by a smaller number.





Finally, with respect to taxes, we examine the true value tax rates of both districts in the following Table 7.17. True value tax rates are the only way to compare one district with another because of varying assessment practices. These tax rates are not necessarily the same rates that a property owner would see on a school tax bill in either district; however, true tax rates are valid for comparison purposes across districts.

<b>Table 7.17 Property Tax Rates on True Value</b>			
<b>Year</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Combined*</b>
2016-17	\$14.90	\$20.08	\$17.40
2017-18	\$17.44	\$19.20	\$18.30
2018-19	\$17.08	\$19.62	\$18.28
2019-20	\$17.91	\$18.76	\$18.32
2020-21	\$18.26	\$19.82	\$19.00
*Calculated using the Combined Property Full Value and Combined Property Tax Levy for both districts			

As can be seen from Table 7.17 above, the tax rates on true value in both districts

have fluctuated over the past five years. From 2016-17 to 2020-21, the tax rate on true value in Schenevus has increased by 22.6% (again noting the sizable jump in the tax levy between 2016-17 and 2017-18) while the rate in Worcester has decreased by 1.3%. If the districts had merged on July 1, 2020, the combined tax rate for 2020-21 would have been \$19.00 per thousand with all other things remaining the same (i.e., no Additional Incentive Aid used to reduce taxes).

**If a merger occurred the total local share for existing capital debt is \$3.7 million.**

It is important for each district to know the extent of capital debt the other district would bring to a merger if it were to occur. The following tables (7.18 and 7.19) show the schedule of indebtedness

each of the districts currently holds. Schenevus has \$10,114,702 in principal and interest (P+I) payments due (\$913,188 local share) and will be retired in 2033 while Worcester's capital debt is \$22,511,925 (\$2,797,643 local share) and will be retired in 2040.



**Table 7.18  
Schenevus Building Debt**

Year Ending June 30	Principal	Interest	Annual Total P+I	Amortized Building Aid	Use of Debt Service Fund	Estimated Local Share
2021	\$500,000	\$322,249	\$822,249	\$709,207	\$41,102	\$71,940
2022	\$520,000	\$301,229	\$821,229	\$709,207	\$41,102	\$70,920
2023	\$540,000	\$279,309	\$819,309	\$709,207	\$41,102	\$69,000
2024	\$565,000	\$257,622	\$822,622	\$709,207	\$41,102	\$72,313
2025	\$580,000	\$234,629	\$814,629	\$709,207	\$41,102	\$64,320
2026	\$615,000	\$209,917	\$824,917	\$709,207	\$41,102	\$74,608
2027	\$640,000	\$182,113	\$822,113	\$709,207	\$41,102	\$71,804
2028	\$670,000	\$154,809	\$824,809	\$709,207	\$41,102	\$74,500
2029	\$630,000	\$125,775	\$755,775	\$649,547	\$41,102	\$65,126
2030	\$655,000	\$97,425	\$752,425	\$649,547	\$41,102	\$61,776
2031	\$685,000	\$67,825	\$752,825	\$649,547	\$41,102	\$62,176
2032	\$710,000	\$46,800	\$756,800	\$649,547	\$41,102	\$66,151
2033	\$500,000	\$25,000	\$525,000	\$395,344	\$41,102	\$88,554
<b>Total</b>	<b>\$7,810,000</b>	<b>\$2,304,702</b>	<b>\$10,114,702</b>	<b>\$8,667,188</b>	<b>\$534,326</b>	<b>\$913,188</b>

<b>Table 7.19 Worcester Building Debt</b>						
Year Ending June 30	Principal	Interest	Annual Total P+I	Amortized Building Aid	Use of Debt Service Fund	Estimated Local Share
2021	\$1,660,000	\$769,644	\$2,429,644	2,144,215		\$285,429
2022	\$1,705,000	\$696,469	\$2,401,469	2,085,662		\$315,807
2023	\$1,775,000	\$629,319	\$2,404,319	2,089,620		\$314,699
2024	\$1,840,000	\$557,619	\$2,397,619	2,089,620		\$307,999
2025	\$1,930,000	\$469,056	\$2,399,056	2,089,620		\$309,436
2026	\$1,990,000	\$375,856	\$2,365,856	2,068,955		\$296,901
2027	\$1,130,000	\$314,856	\$1,444,856	1,208,838		\$236,018
2028	\$1,175,000	\$261,606	\$1,436,606	1,208,838		\$227,768
2029	\$1,180,000	\$206,031	\$1,386,031	1,175,668		\$210,363
2030	\$1,200,000	\$149,344	\$1,349,344	1,175,668		\$173,676
2031	\$700,000	\$90,956	\$790,956	716,981		\$73,975
2032	\$255,000	\$57,456	\$312,456	263,992		\$48,464
2033	\$265,000	\$46,256	\$311,256	263,992		\$47,264
2034	\$275,000	\$34,606	\$309,606	263,992		\$45,614
2035	\$230,000	\$23,506	\$253,506	201,481		\$52,025
2036	\$115,000	\$15,456	\$130,456	138,970		-\$8,514
2037	\$120,000	\$11,863	\$131,863	135,011		-\$3,148
2038	\$120,000	\$7,963	\$127,963	131,053		-\$3,090
2039	\$125,000	\$4,063	\$129,063	131,053		-\$1,990
2040				131,053		-\$131,053
<b>Total</b>	<b>\$17,790,000</b>	<b>\$4,721,925</b>	<b>\$22,511,925</b>	<b>\$19,714,282</b>	<b>\$0</b>	<b>\$2,797,643</b>

In a merged district, the total local responsibility for outstanding debt would be \$3,710,831.

The current Building Aid ratio for Schenevus is 84.0% while the Building Aid ratio for Worcester is 84.3%. This means that the state reimburses Schenevus \$0.84 and Worcester \$0.843 on every dollar spent for approved building project expenses. When school districts combine, two state financial incentives exist. For new construction, the state will enhance the higher of the former district’s Building Aid ratio by an additional 30%, up to a maximum of 95% of all approved capital costs or up to 98% for high needs districts. Schenevus and Worcester are both high needs districts. This means that any new approved capital construction in a combined district would be aided at the maximum 98% for a high needs district (.843 Building Aid ratio of Worcester X 30% added to its 84.3% current Aid percentage = 98% cap). This incentive exists for a period of ten years from the official date of the annexation. In addition, as noted earlier in this chapter, should the combined district undertake a new capital project, a capital reserve account in the amount of \$68,044 would also exist to aid in reducing the local tax impact.

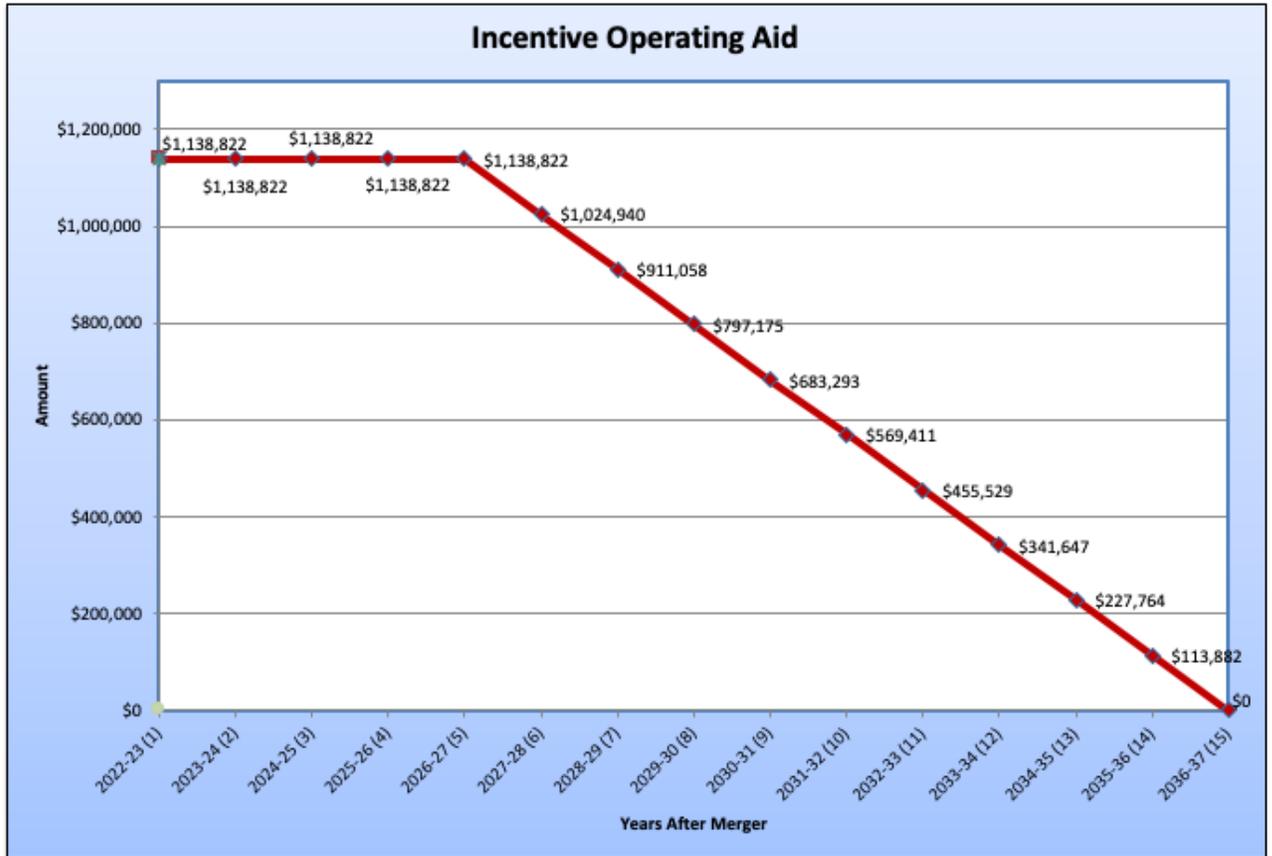
The second financial incentive relating to facilities that the state provides for merged districts pertains to existing capital debt. In this situation, the state will determine the total capital debt of the combined district and will pay State Aid at the higher of the two previous districts’ Building Aid ratios. This means that the capital debt that the state is now aiding at Schenevus’ current Building Aid ratio (.840) would be aided at Worcester’s higher current Building Aid ratio (.843) if the two districts combined. Given the very small difference in Building Aid ratios between the two districts, the additional Building Aid is not a significant financial factor but is included in the financial summary analysis that follows later in this chapter. Table 7.20 shows the history of Building Aid ratios for both study districts.

<b>Table 7.20 Building Aid Ratios</b>		
<b>Schenevus</b>	<b>Worcester</b>	<b>Voter Approval Date</b>
.804	.808	prior to 7/1/98
.904	.908	on or after 7/1/1998 but prior to 6/30/2000
.805	.808	on or after 7/1/2000 but prior to 6/30/2005
.840	.843	on or after 7/1/2005

As mentioned frequently in this report, New York State provides significant financial incentives for school districts that merge. In addition to the Building Aid incentives mentioned above, the state also provides reorganization Incentive Operating Aid. This reorganization Incentive Operating Aid formula is based on the 2006-07 Operating Aid for each district. For Schenevus, this Operating Aid is \$1,312,035 and for Worcester, the 2006-07 Operating Aid is \$1,535,020. In calculating the Incentive Operating Aid, the state adds the Operating Aids of the two districts together and then multiplies this aid by 40% for each of the first five years after the merger. Starting in year six, the Incentive Operating Aid decreases by 4% a year for the next nine years until year 15 when the Incentive Operating Aid runs out. Table 7.21 below shows the Incentive Operating Aid that would be paid to the merged district. As can be seen from this table, a merged district of Schenevus and Worcester would generate \$10,818,809 in additional State Aid over the next fourteen years. This Aid is above and beyond all other categories/amounts of State Aid received by the merged district.

<b>Table 7.21 Incentive Operating Aid for Schenevus and Worcester</b>					
Year	Schenevus 2006-07 Operating Aid	Worcester 2006-07 Operating Aid	Combined 2006-07 Operating Aid	Incentive Operating Aid %	Incentive Operating Aid
2022-23 (1)	\$1,312,035	\$1,535,020	\$2,847,055	40%	\$1,138,822
2023-24 (2)	\$1,312,035	\$1,535,020	\$2,847,055	40%	\$1,138,822
2024-25 (3)	\$1,312,035	\$1,535,020	\$2,847,055	40%	\$1,138,822
2025-26 (4)	\$1,312,035	\$1,535,020	\$2,847,055	40%	\$1,138,822
2026-27 (5)	\$1,312,035	\$1,535,020	\$2,847,055	40%	\$1,138,822
2027-28 (6)	\$1,312,035	\$1,535,020	\$2,847,055	36%	\$1,024,940
2028-29 (7)	\$1,312,035	\$1,535,020	\$2,847,055	32%	\$911,058
2029-30 (8)	\$1,312,035	\$1,535,020	\$2,847,055	28%	\$797,175
2030-31 (9)	\$1,312,035	\$1,535,020	\$2,847,055	24%	\$683,293
2031-32 (10)	\$1,312,035	\$1,535,020	\$2,847,055	20%	\$569,411
2032-33 (11)	\$1,312,035	\$1,535,020	\$2,847,055	16%	\$455,529
2033-34 (12)	\$1,312,035	\$1,535,020	\$2,847,055	12%	\$341,647
2034-35 (13)	\$1,312,035	\$1,535,020	\$2,847,055	8%	\$227,764
2035-36 (14)	\$1,312,035	\$1,535,020	\$2,847,055	4%	\$113,882
2036-37 (15)	\$1,312,035	\$1,535,020	\$2,847,055	0%	\$0
				<b>TOTAL</b>	<b>\$10,818,809</b>

Graphically, the gradual weaning away of the Incentive Aid is illustrated in the graph follows.



It is rare that a merged school district would apply all of its Incentive Operating Aid to reduce taxes, and the consultants would not recommend such an action. There is no question that given the current state of school district finances, residents are keenly interested in knowing how financial incentives will impact their taxes. However, voters are also interested in knowing how the district’s academic and extra-curricular program can be improved and how the district’s strong fiscal health can be ensured over an extended period of time. While decisions about the allocation of resources are left solely to the discretion of the Worcester Board of Education, it is not unusual for boards to initially consider dividing the Incentive Operating Aid into three relatively equal priorities.

These priorities are:

1. Using funds to pay for transition costs, program enhancements, and starting new programs. There are always costs that exist when two school districts

merge. These costs may include starting new academic programs, starting new extra-curricular programs, buying new uniforms, etc. Additionally, the Incentive Operating Aid allows the enlarged district to consider enhancements and additions to instructional staff and equipment to improve teaching and learning opportunities. If the merged district allocates 33.33% of the Incentive Operating Aid for transition costs, Table 7.22 that follows shows that \$3,605,909 will have been devoted to this priority over the first fourteen years of the merger.

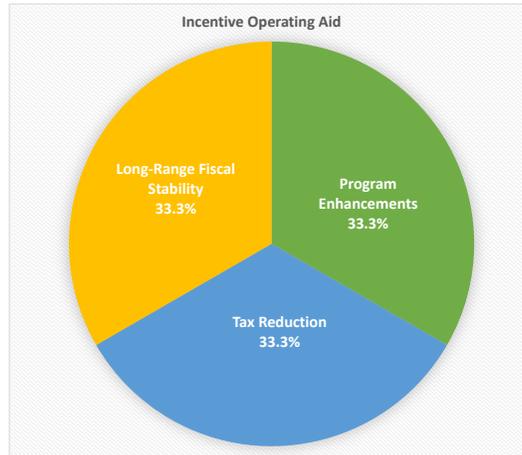
<b>Table 7.22</b>	
<b>33.33% Incentive Operating Aid</b>	
<b>Year of Merger</b>	<b>Incentive Operating Aid</b>
2022-23 (1)	\$379,569
2023-24 (2)	\$379,569
2024-25 (3)	\$379,569
2025-26 (4)	\$379,569
2026-27 (5)	\$379,569
2027-28 (6)	\$341,612
2028-29 (7)	\$303,655
2029-30 (8)	\$265,699
2030-31 (9)	\$227,742
2031-32 (10)	\$189,785
2032-33 (11)	\$151,828
2033-34 (12)	\$113,871
2034-35 (13)	\$75,914
2035-36 (14)	\$37,957
2036-37 (15)	\$0
<b>TOTAL</b>	<b>\$3,605,909</b>

- Using Aid to fund reserves to ensure the long-term fiscal stability of the merged district; assuming an allocation of 1/3 of Incentive Operating Aid to each of the three priorities, \$379,569 would be available in each of the first five years for developing a long term financial strategy to fund reserves in a way that would assist in providing long term stability of the merged district’s finances. Starting in year six, and for each year thereafter for the next nine years, the Incentive Operating Aid from the state decreases by 4%. If prudent planning has not been done in advance, this reduction in Incentive Operating Aid will result in significant tax increases for the residents. If the merged

district allocates 33.33% of the Incentive Operating Aid for long term fiscal stability, Table 7.23 that follows shows that \$3,605,909 will have been devoted to this priority over the first fourteen years of the merger.

<b>Table 7.23</b>	
<b>33.33% Incentive Operating Aid</b>	
<b>Year of Merger</b>	<b>Incentive Operating Aid</b>
2022-23 (1)	\$379,569
2023-24 (2)	\$379,569
2024-25 (3)	\$379,569
2025-26 (4)	\$379,569
2026-27 (5)	\$379,569
2027-28 (6)	\$341,612
2028-29 (7)	\$303,655
2029-30 (8)	\$265,699
2030-31 (9)	\$227,742
2031-32 (10)	\$189,785
2032-33 (11)	\$151,828
2033-34 (12)	\$113,871
2034-35 (13)	\$75,914
2035-36 (14)	\$37,957
2036-37 (15)	\$0
<b>TOTAL</b>	<b>\$3,605,909</b>

- Using funds to reduce taxes. In each of the first five years, \$379,569 would be used to reduce the local tax levy. Starting in year six, this amount would decrease as described above. Table 7.24 that follows shows the effect of applying 1/3 of the Incentive Operating Aid to reduce local taxes. In this example, both districts would see a reduction to the current tax rate on true value.



**Table 7.24**  
**Impact of 33.3% Incentive Operating Aid on True Tax Rate**

Year of Merger	Full Value Property Wealth	Tax Levy w/o IOA	True Value Tax Rate w/o IOA	Incentive Operating Aid	Tax Levy with IOA	True Value Tax Rate with IOA	Change in Tax Rate from Merged District Tax Rate
2022-23 (1)	\$383,635,592	\$7,289,769	\$19.00	\$379,569	\$6,910,199	\$18.01	-\$0.99
2023-24 (2)	\$391,308,303	\$7,435,564	\$19.00	\$379,569	\$7,055,995	\$18.03	-\$0.97
2024-25 (3)	\$399,134,469	\$7,584,275	\$19.00	\$379,569	\$7,204,706	\$18.05	-\$0.95
2025-26 (4)	\$407,117,159	\$7,735,961	\$19.00	\$379,569	\$7,356,391	\$18.07	-\$0.93
2026-27 (5)	\$415,259,502	\$7,890,680	\$19.00	\$379,569	\$7,511,111	\$18.09	-\$0.91
2027-28 (6)	\$423,564,692	\$8,048,494	\$19.00	\$341,612	\$7,706,881	\$18.20	-\$0.81
2028-29 (7)	\$432,035,986	\$8,209,463	\$19.00	\$303,655	\$7,905,808	\$18.30	-\$0.70
2029-30 (8)	\$440,676,706	\$8,373,653	\$19.00	\$265,699	\$8,107,954	\$18.40	-\$0.60
2030-31 (9)	\$449,490,240	\$8,541,126	\$19.00	\$227,742	\$8,313,384	\$18.50	-\$0.51
2031-32 (10)	\$458,480,045	\$8,711,948	\$19.00	\$189,785	\$8,522,164	\$18.59	-\$0.41
2032-33 (11)	\$467,649,645	\$8,886,187	\$19.00	\$151,828	\$8,734,359	\$18.68	-\$0.32
2033-34 (12)	\$477,002,638	\$9,063,911	\$19.00	\$113,871	\$8,950,040	\$18.76	-\$0.24
2034-35 (13)	\$486,542,691	\$9,245,189	\$19.00	\$75,914	\$9,169,275	\$18.85	-\$0.16
2035-36 (14)	\$496,273,545	\$9,430,093	\$19.00	\$37,957	\$9,392,136	\$18.93	-\$0.08
2036-37 (15)	\$506,199,016	\$9,618,695	\$19.00	\$0	\$9,618,695	\$19.00	\$0.00

The above table reflects what the property wealth and tax levy, using 2020-21 data from each district, would look like in a combined district. The only way to accurately compare the tax rates between different towns in school districts is to calculate the true value tax rate using the equalization rates established by New York State for each town. This process eliminates variations in assessing practices between towns and provides an

accurate basis for comparison. The true value tax rate is different from the *assessed* value tax rate that appears on an individual tax bill. Using this information, the true value tax rate in a merged district without Incentive Operating Aid would be \$19.00 per thousand dollars of property value. When 1/3 of the Incentive Operating Aid is applied to the combined tax levy, the true value tax rate drops to \$18.01 in year one without factoring in any additional savings realized from operational aspects of the merger.

One reason to consider a merger between two districts is to improve the efficiency of district operations. Table 7.25 below identifies some possible areas in which savings would be realized should the current Schenevus and Worcester districts combine to form one district. Expenditures for BOCES services generate BOCES Aid from the state. Should BOCES expenditures be reduced, there would be a corresponding reduction in BOCES Aid based on the district's BOCES Aid ratio. Therefore, the loss of BOCES Aid has also been identified in Table 7.25 and will be factored into the summary financial analysis (Table 7.26).

<b>Table 7.25 Potential Areas of Efficiency</b>					
<b>Item</b>	<b>Schenevus</b>	<b>Worcester</b>	<b>Total</b>	<b>Potential Savings</b>	<b>BOCES Aid Lost</b>
NYSSBA Dues	\$3,755	\$0	\$3,755	\$0	
Local Board Professional Development	\$0	\$1,700	\$1,700	\$0	
Rural School Dues	\$800	\$0	\$800	\$0	
BOCES Board Support	\$955	\$100	\$1,055	\$500	\$298
Fiscal Advisor	\$10,000	\$5,000	\$15,000	\$5,000	
BOCES Business Administration	\$91,656	\$143,904	\$235,560	\$40,000	\$23,868
Auditing Services	\$13,000	\$10,500	\$23,500	\$8,000	
Tax Collector	\$8,746	\$5,250	\$13,996	\$3,000	
NYSCOSS Dues/Professional Development	\$2,000	\$2,000	\$4,000	\$2,000	
Legal Services	\$2,500	\$16,000	\$18,500	\$2,500	
BOCES Labor Relations/Personnel	\$31,728	\$28,684	\$60,412	\$21,330	\$12,728
BOCES Operation of Plant	\$24,749	\$24,520	\$49,269	\$15,847	\$9,456
BOCES Central Data Processing	\$132,034	\$51,275	\$183,309	\$20,000	\$11,934
BOCES Staff Development	\$66,047	\$105,209	\$171,256	\$54,404	\$32,463
BOCES Teaching-Regular School	\$115,641	\$83,944	\$199,585	\$28,825	\$17,200
Special Ed Software			\$0		
BOCES Library/AV	\$57,566	\$90,652	\$148,218	\$30,475	\$18,184
BOCES Health Education	\$31,145	\$0	\$31,145	\$31,145	\$18,584
BOCES Sports Coordination	\$3,440	\$0	\$3,440	\$3,440	\$2,053
BOCES Policy Service			\$0		\$0
BOCES Cooperative Advertising			\$0		\$0
BOCES School Lunch Manager			\$0		\$0
BOCES State Aid Planning			\$0		\$0
BOCES Cooperative Bidding	\$3,943	\$0	\$3,943	\$1,000	\$597
BOCES STEM Mentor			\$0		\$0
BOCES CIO			\$0		\$0
BOCES Grant Writing Service			\$0		\$0
BOCES School Psychologist			\$0		
BOCES Model Schools			\$0		\$0
<b>TOTAL</b>	<b>\$599,705</b>	<b>\$568,738</b>	<b>\$1,168,443</b>	<b>\$267,466</b>	<b>\$147,365</b>

Finally, it is very common to realize significant staff salary and fringe benefit savings in a merger. At the same time, however, it has also been fairly commonplace to level up salaries. Leveling up is the term that is used when staff from the lower paying district in a merger are compensated on the salary schedule of the higher paying school district in the merger. It should be clearly understood that there is no requirement that this leveling up process to occur nor that the process, if implemented, occur in one year.

Oftentimes however, the process of leveling up salaries is funded by using a portion of the Incentive Operating Aid.

We now look to summarize the total financial impact on the merged school district in Table 7.26. In preparing this summary, the following factors will be examined:

- Incentive Operating Aid - extra State Aid that the districts would receive by merging. For this summary, we are assuming 33.33% of this Incentive Aid is used to reduce the local property tax levy. Using this amount of Incentive Aid, both Schenevus and Worcester taxpayers would see a reduction from their current property tax rate. It should be noted that the Worcester Board of Education may choose to apply more or less Incentive Aid to the property tax levy.

- Incentive Building Aid - additional state Building Aid the merged district would receive to assist in paying off their existing building debt.

- Potential staff reductions - positions that could be eliminated as a result of a merger.

- Additional Transportation Aid – additional state Transportation Aid the merged district would receive due to additional mileage and costs to move students between district buildings.

- Budget efficiencies due to the merger - legal and auditing services, memberships, dues, and other budgetary redundancy that can be eliminated because of the merger. (Table 7.25).

- Loss of BOCES Aid - to reflect the loss of BOCES Aid that the merged district would not receive if BOCES services are reduced as a result of budget efficiencies in a merged district.

- Additional transportation expense – estimated cost for additional shuttle bus run to transport students between district buildings.

- Leveling up salaries - increasing teacher salaries and corresponding benefits from the lower paid district to the higher district's salary schedule.

In calculating the financial impact of these items, some assumptions are made:

1. The savings due to budget efficiencies have been increased annually by 2%.
2. The savings that are realized from the reduction of teaching positions and

restructuring the administrative staff as well as the additional costs for leveling up teacher salaries have all been increased by 2% annually.

3. The loss of BOCES Aid has also been increased by 2% annually to match the corresponding increase in expense reflected in the budget efficiencies.

Table 7.26 that follows provides a complete look at the financial impact of the merger based on the above assumptions.

<b>Table 7.26 - Summary Financial Analysis for the Merged District (33% Incentive Aid Applied)</b>										
Year	33.3% Incentive Operating Aid	Additional Building Aid	*Annual Staff Reduction & Savings	Additional Transportation Aid	Budget Efficiencies		Loss of BOCES Aid	Additional Transportation Shuttle Costs	*Leveling Up of Teacher Salaries and Benefits	Total
2022-23 (1)	\$379,569	\$3,277	\$490,656	\$0	\$267,466		\$147,365	\$81,585	\$169,472	\$742,547
2023-24 (2)	\$379,569	\$3,290	\$500,469	\$73,427	\$272,815		\$150,312	\$83,217	\$172,861	\$823,180
2024-25 (3)	\$379,569	\$3,259	\$510,479	\$74,895	\$278,272		\$153,319	\$84,881	\$176,319	\$831,955
2025-26 (4)	\$379,569	\$3,300	\$720,121	\$76,393	\$283,837		\$156,385	\$86,579	\$179,845	\$1,040,411
2026-27 (5)	\$379,569	\$3,288	\$734,523	\$77,921	\$289,514		\$159,513	\$88,310	\$183,442	\$1,053,551
2027-28 (6)	\$341,612	\$3,299	\$749,214	\$79,479	\$295,304		\$162,703	\$90,076	\$187,111	\$1,029,019
2028-29 (7)	\$303,655	\$3,023	\$764,198	\$81,069	\$301,210		\$165,957	\$91,878	\$190,853	\$1,004,468
2029-30 (8)	\$265,699	\$3,010	\$779,482	\$82,690	\$307,234		\$169,276	\$93,716	\$194,670	\$980,453
2030-31 (9)	\$227,742	\$3,011	\$795,072	\$84,344	\$313,379		\$172,662	\$95,590	\$198,563	\$956,733
2031-32 (10)	\$189,785	\$3,027	\$810,973	\$86,031	\$319,647		\$176,115	\$97,502	\$202,535	\$933,311
2032-33 (11)	\$151,828	\$2,100	\$827,193	\$87,751	\$326,040		\$179,637	\$99,452	\$206,585	\$909,237
2033-34 (12)	\$113,871	\$0	\$843,737	\$89,506	\$332,560		\$183,230	\$101,441	\$210,717	\$884,287
2034-35 (13)	\$75,914	\$0	\$860,611	\$91,297	\$339,212		\$186,894	\$103,470	\$214,931	\$861,738
2035-36 (14)	\$37,957	\$0	\$877,824	\$93,123	\$345,996		\$190,632	\$105,539	\$219,230	\$839,498
2036-37 (15)	\$0	\$0	\$895,380	\$94,985	\$352,916		\$194,445	\$107,650	\$223,615	\$817,571
<b>TOTAL</b>	<b>\$3,605,909</b>	<b>\$33,885</b>	<b>\$11,159,932</b>	<b>\$1,172,910</b>	<b>\$4,625,401</b>		<b>\$2,548,444</b>	<b>\$1,410,883</b>	<b>\$2,930,750</b>	<b>\$13,707,960</b>
* Assumed 2% annual increase										

*Annual Staff Reductions/Savings effective 7/1/22: 4.0 Teachers.....	\$349,164
1.0 Principal.....	<u>\$141,492</u>
	\$490,656
Leveling Up Teacher Salary & Benefits.....	<u>&lt;\$169,472&gt;</u>
Net Staffing Savings.....	\$321,184

Additional Annual Staff Reductions/Savings effective 7/1/25:  
1.0 Superintendent.....\$199,433

As can be seen in Table 7.26, approximately \$13,707,960 of additional dollars could be realized by the merged school district over the next fifteen years through additional Aid monies and reduction of expense through operational efficiencies.

From a financial perspective, there are a variety of considerations in this merger study:

1. Small school districts considering merger are often eligible for significant amounts of Incentive Operating Aid as noted above for Schenevus and Worcester. However, we do not recommend that all of the additional Incentive Operating Aid be used to reduce taxes. Therefore, in Table 7.26, only 33.3% of the Incentive Aid is shown in this summary chart. With this model, the property tax rate for residents in both districts will decrease.

2. After a merger, existing capital debt is aided at the higher of the two districts' Building Aid ratios. Schenevus and Worcester have Building Aid ratios that are very close. Nevertheless, this small difference does drive slightly more state Building Aid on the existing debt to the newly merged district.

3. Table 7.26 also shows the projected staff savings (4.0 FTE) following a merger as discussed in the staffing chapter of this report effective July 1, 2022. Additionally, savings for a superintendent's salary and benefits will be realized effective July 1, 2025.

4. Small school districts are relatively expensive to operate. In merging the two districts, savings due to scale economies are realized that are important to the overall financial picture of the district. These budget efficiencies are noted in the table as well.

5. The districts will lose BOCES Aid due to the likely reduction of redundant BOCES services in a merged district.

6. An additional annual cost (\$169,472 in year one) will be required over fourteen years if teacher salaries are leveled-up. Table 7.26 reflects complete leveling up in year one.

Finally, it is important to examine the impact that the savings noted in Table 7.26 would have on the tax rate in the two districts. To do so, the 2020-21 fiscal year property tax data is being used for illustrative purposes knowing if a merger were to occur it would not take place until 2022-23.

In calculating the impact on the true tax rate, the following Table 7.27 is developed to show relevant financial factors for the two districts.

<b>Table 7.27 Tax Rate Impact Due to Merger Savings</b>			
Year/Factor	Schenevus	Worcester	Combined
2020 Full Value	\$193,026,894	\$175,711,660	\$368,738,554
2020-21 Tax Levy	\$3,524,889	\$3,481,809	\$7,006,698
2020 True Value Tax Rate/\$1000	\$18.26	\$19.82	\$19.00
Savings/Revenue noted in Table 7.24 in Year 1 of Merger			\$742,547
Local Levy using savings			\$6,264,151
2019-20 True Value Tax rate after using 100% of savings with 33% IOA			\$16.99

The actual true value tax rate for Schenevus for the 2020-21 school year was \$18.26 per thousand dollars of full property value; in Worcester it was \$19.82. In the event that all of the projected savings noted in Table 7.26 (\$742,547) was used to reduce taxes, it would result in a tax rate on true value of \$16.99 per thousand of full value in the merged district (Reminder: Table 7.27 shows only 33.3% of the additional Incentive Operating Aid the merged district would receive). This would result in a reduction in the current tax rate on true value of \$1.27 (-7.0%) for Schenevus residents while Worcester residents would see a reduction of \$2.83 (-14.3 %) in the current tax rate on true value.

One way to look at the significance of this tax rate reduction is to analyze how many years it would take for the merged district tax rate to reach the current tax rate of each of the two districts. Although the average increase in the tax rate for both districts is less than 2%, we have estimated that the tax rate for the merged district would increase by 2% per year from its tax rate at the time of merger of \$16.99. Actual tax rate increases could be more or less than this number. The results of that analysis are shown in Table 7.28 that follows:

<b>Table 7.28 Time Necessary for Merged District to Reach Current District Tax Rates</b>		
<b>Year</b>	<b>Schenevus (Current Tax Rate=\$18.26/\$1000)</b>	<b>Worcester (Current Tax Rate = \$19.82/\$1000)</b>
2022-23	\$16.99	\$16.99
2023-24	\$17.33	\$17.33
2024-25	\$17.68	\$17.68
2025-26	\$18.03	\$18.03
2026-27	\$18.39	\$18.39
2027-28		\$18.76
2028-29		\$19.13
2029-30		\$19.52
2030-31		\$19.91

Table 7.28 above shows that the merged district would begin with a true value tax rate of \$16.99 in 2022-23. Assuming an annual 2% increase in that tax rate, it would take four years for the Schenevus taxpayers to be back to their current tax rate of \$18.26 and it would take the Worcester taxpayers eight years to be back to their 2020-21 tax rate of \$19.82. Since Worcester is currently at a higher tax rate than Schenevus, this anticipated reduction in the tax rate in a merged district would be even more profound for the Worcester taxpayers.

To further extrapolate this analysis, Table 7.29 uses the 2020-21 combined property tax levy for Schenevus and Worcester, deducts the year one savings noted in Table 7.26 (\$742,547), and calculates what the tax rate would be on the assessed property value in each town for the combined district. The assessed tax rate, unlike the full value tax rate, is the rate that property owners see on their tax bill. If property owners are

interested in determining the effect that any merger savings would have on their tax bill, it is the assessed tax rate that should be used.

<b>Table 7.29 Impact of 33% Incentive Operating Aid Plus Additional Savings on Assessed Tax Rates</b>				
Town	2020-21 School Tax Levy using 33.3% of Incentive Aid plus Additional Savings	Merged 2020-21 Tax Rate / \$1000 Assessed	Schenevus 2020-21 Actual Tax Rate / \$1000	Worcester 2020-21 Actual Tax Rate / \$1000
Decatur	\$571,572	\$33.06	\$35.12	\$39.18
Maryland	\$2,315,694	\$17.19	\$18.26	\$19.82
Westford	\$1,059,493	\$17.19	\$18.26	\$20.57
Worcester	\$2,247,831	\$28.84		\$34.04
Harpersfield	\$2,343	\$62.51		\$72.06
Milford	\$15,932	\$17.19	\$18.26	
<u>Roseboom</u>	<u>\$51,286</u>	\$16.17	\$17.18	
Total	\$6,264,151			

Table 7.29 above shows the reductions, by town, that would be realized should the financial impact of the merger be managed as described in this report. Assuming no change in current property wealth or equalization rates, individual homeowners could estimate their tax savings over time. For example, a property in the Schenevus school district in the Town of Decatur with an assessed value of \$100,000 would see its school taxes decrease from approximately \$3,512 per year to approximately \$3,306, a decrease of \$206 or 5.9%; a similar property located in the Worcester school district would see its school taxes decrease from approximately \$3,918 to \$3,306, a decrease of \$612 or 15.6%. Another property that might be located in the Worcester school district in the Town of Worcester with an assessed value of \$200,000 would see its property taxes decrease from approximately \$6,808 to approximately \$5,768, a decrease of \$1,040 or 15.3%. Using the assumptions in this paragraph, any property owner could calculate school tax savings related to the merger by knowing the town within which the property is located and the assessed value of the property.

In conclusion, a merged Schenevus-Worcester school district that chose to use about one-third of the additional Incentive Operating Aid would be able to provide tax relief to residents of each district and, at the same time, have significant additional new money to maintain/improve the academic program and to reserve funds for future use.

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**A merged Schenevus-Worcester school district could provide tax relief to residents, enhance academic programs, and reserve funds for future use.**

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## Chapter VIII

### Key Findings and Recommendations

It is not within our province or the purpose of this study to recommend whether Schenevus and Worcester should merge their two districts into one. However, it is important that, following this in-depth investigation, key findings and related recommendations be offered to a new board of education should residents of both districts vote for the annexation of Schenevus by Worcester. It should also be understood by the reader that none of our recommendations and/or the previously noted assurances are legally binding on the Worcester board of education if the annexation occurs, but rather offer a starting point for discussion and policymaking.

FINDINGS	RECOMMENDATIONS
<p><u>Finding 1:</u> Both the Schenevus and Worcester school districts have experienced declining enrollments over the past six years. Looking to the future, an enlarged district will likely continue to see a decline in K-12 student enrollment. (Tables 2.2, 2.3, &amp; 2.4)</p> <p><u>Finding 2:</u> It is unlikely that either home-schooled students, those resident students attending elsewhere, and non-resident students attending an enlarged district will have a significant impact on overall future enrollment patterns. (Tables 2.5, 2.6, &amp; 2.7)</p>	<p><b><i>Recommendation 1: A merged Schenevus/Worcester school district should annually update enrollment projections to accurately monitor its student population.</i></b></p>

<p><u>Finding 3:</u> The two districts have a somewhat different grade level pattern. Schenevus organizes its grades into a Pre-K-5, 5-8, 9-12 configuration while Worcester uses a Pre-K-6, 7-12 approach. (Table 3.1)</p> <p><u>Finding 4:</u> At the elementary level, the teacher and student days are slightly different. Worcester students have an elementary day that is 13 minutes longer than the Schenevus students. Staff days are different in terms of starting and ending times; the Worcester teacher day is 25 minutes longer than the Schenevus teacher day (Table 3.2)</p> <p><u>Finding 5:</u> Schenevus has eight sections of elementary classrooms with an average class size of 17.9; Worcester has ten sections of elementary classrooms with an average class size of 16.8. (Table 3.3)</p> <p><u>Finding 6:</u> A merged elementary school could have 15 sections of elementary classrooms with an average class size of 20.7. (Table 3.4)</p> <p><u>Finding 7:</u> There are some curricular differences at the elementary level that will have to be resolved. (Table 3.5)</p>	<p><b><i>Recommendation 2: If Schenevus is annexed by Worcester, a decision should be made to define the grade configuration for the merged district to be either Pre-K-5, 6-8. &amp; 9-12 or Pre-K-6 &amp; 7-12.</i></b></p> <p><b><i>Recommendation 3: If Schenevus is annexed by Worcester, a committee of elementary teachers and an administrator should be convened as soon as possible to review the existing curriculum and make recommendations for a common core curriculum for grades PreK-6, including special subjects. This committee should have representatives from both districts.</i></b></p>
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<p><u>Finding 8:</u> In examining grades 3-8 student performance on the New York State ELA and math tests from 2015-16 to 2018-19, there is little significant difference between the two districts. However, it should be noted that it is difficult to make any valid comparisons as the small cohorts of students can cause wide percentage swings from year to year. (Tables 3.6 and 3.7)</p> <p><u>Finding 9:</u> Junior-senior high school course offerings show a solid but somewhat limited academic program for students from both Schenevus and Worcester. Each district has some unique offerings that would benefit students in the other district. (Table 3.8)</p> <p><u>Finding 10:</u> Schenevus has fewer than ten students in 35.9% of its secondary course offerings while Worcester has fewer than ten students in 18.9% of its classes. (Table 3.10)</p> <p><u>Finding 11:</u> In a merged district, it would be possible to offer all junior-senior high school courses currently available in both districts and reduce some staff positions, while maintaining reasonable (maximum of 22 students) class sizes. (Table 3.11)</p> <p><u>Finding 12:</u> In addition to offering all of the courses currently available in both high schools and keeping maximum class sizes at 22, a merged high school would have the opportunity to offer even more elective courses. (Table 3.11)</p> <p><u>Finding 13:</u> Both districts have made considerable cuts in their programs over the past four years. (Table 3.13)</p> <p><u>Finding 14:</u> In examining student performance on the New York State Regents exams and in looking at graduation statistics, there is considerable similarity across the two districts. (Table 3.15)</p>	<p><b><i>Recommendation 4: In a merged district, the Worcester Board of Education and administration should attempt to provide all of the high school courses now being offered in both districts, assuming sufficient enrollments.</i></b></p> <p><b><i>Recommendation 5: In a merged district, the Worcester Board of Education and administration should attempt to develop more elective courses for students at the high school level.</i></b></p>
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<p><b>Finding 15:</b> Secondary students in both districts have a solid but somewhat limited array of interscholastic and extra-curricular activities from which to choose. (Tables 3.16 &amp; 3.17)</p>	<p><b>Recommendation 6:</b> <i>In a merged district, the Worcester Board of Education and administration should attempt to provide all of the extra-curricular programs now being offered in both districts, assuming sufficient participation.</i></p> <p><b>Recommendation 7:</b> <i>In a merged district, the Board of Education and administration should attempt to develop more extra-curricular opportunities for students at the secondary level, assuming sufficient participation.</i></p>
<p><b>Finding 16:</b> The percentage and placement of special education students is somewhat different the two districts. (Table 3.18, 3.19, &amp; 3.20)</p>	<p><b>Recommendation 8:</b> <i>If merged, a new Committee on Special Education and Pre-School Committee on Special Education should be appointed. These new committees should contain approximately equal representation from each of the previous district's committees. A district philosophy and priorities for special education instruction should be identified by this committee.</i></p>

<p><b>Finding 17:</b> Both school districts have done a good job of maintaining their school facilities, and neither has a tremendous amount of outstanding work to be done in the immediate future. (Table 4.4)</p> <p><b>Finding 18:</b> Non-school groups use the facilities in each of the study districts as both buildings are centers of their communities. (Table 4.5)</p> <p><b>Finding 19:</b> The Schenevus and Worcester facilities offer adequate space to house existing programs following a merger. The assurances have stated that both buildings will remain open for the foreseeable future. (Tables 4.7-4.18)</p>	<p><b>Recommendation 9:</b> <i>If a merger occurs, the elementary school housing either grades Pre-K-5 or grades Pre-K-6 should be located in the current Schenevus building; all students in either grades 6-12 or 7-12 should attend the current Worcester building.</i></p>
<p><b>Finding 20:</b> Both districts operate their own transportation program and have their own transportation facilities; Schenevus contracts maintenance services to Leonard Bus Sales for one day per week.</p> <p><b>Finding 21:</b> The bus fleets of each study district have been well maintained and are replaced at appropriate times. (Tables 5.1 &amp; 5.3)</p> <p><b>Finding 22:</b> While out of district runs may be longer, the longest bus run in each district currently is approximately one hour. (Tables 5.2 &amp; 5.4)</p> <p><b>Finding 23:</b> Both districts employ a single bus run daily to transport students to and from school.</p> <p><b>Finding 24:</b> Whether through a shuttle system or through adding an additional bus run, the cost of getting students from one district to another is quite minimal.</p>	<p><b>Recommendation 10:</b> <i>If a merger occurs, a transportation plan must be finalized for getting the current Schenevus secondary students to Worcester and the current Worcester elementary students to Schenevus.</i></p> <p><b>Recommendation 11:</b> <i>If a merger occurs, both bus facilities should be maintained, at least for the foreseeable future.</i></p>

<p><u>Finding 25:</u> Aside from the salary schedules, the teacher contracts in the two districts are fairly similar. If teacher salaries are leveled-up, Worcester teachers would see a salary increase. Leveling up all teacher salaries would cost the merged district an additional \$125,535 plus \$43,937 in related fringe benefits or a total cost of \$169,472. (Table 6.5)</p>	<p><b><i>Recommendation 12: As soon as possible following a merger, the Board of Education should negotiate a new collective bargaining agreement to determine the terms and conditions of employment for the current Schenevus teachers.</i></b></p>
<p><u>Finding 26:</u> Staff efficiencies would occur if the districts merge. It is estimated that three fewer elementary school teachers and one secondary teacher would not be needed after a merger. This reduction by attrition would result in savings of approximately \$349,164 in teacher salaries and benefits.</p> <p><u>Finding 27:</u> Should a merger occur, one less building administrator would be required resulting in a savings of approximately \$141,492. (Table 6.11)</p> <p><u>Finding 28:</u> Should a merger occur, one less superintendent would be employed resulting in a savings of approximately \$199,764 as of July 1, 2025.</p> <p><u>Finding 29:</u> Because some duplicate inter-scholastic sports coaching salaries would be eliminated at the same time that new sports/teams might be added, no financial impact is calculated with respect to the athletic program.</p> <p><u>Finding 30:</u> Because support staff titles and salaries are so different and difficult to compare from one district to the other, no financial impact for support staff has been calculated.</p>	<p><b><i>Recommendation 13: Should a merger occur, the Board of Education should define the staffing structure for the merged district at the earliest possible date.</i></b></p>

<p><u>Finding 31</u>: Both districts have had the consistent support of their respective communities for budget proposals presented. This is an indicator of a community’s support for its schools. (Table 7.1)</p> <p>Finding 32: Worcester has more fund balance than Schenevus. Schenevus also has a Revenue Anticipation Note Payable. (Table 7.2)</p> <p><u>Finding 33</u>: Both districts purchase a significant number of services from Otsego-Northern Catskills (ONC) BOCES annually. (Table 7.5)</p> <p><u>Finding 34</u>: The operating expenses per student in Schenevus and Worcester are quite similar. (Table 7.7)</p> <p><u>Finding 35</u>: State Aid per student has been quite similar in the two districts over the past 5 years. (Tables 7.11)</p> <p><u>Finding 36</u>: While the total full value property wealth is slightly higher in Schenevus, the districts are quite similar. (Tables 7.13)</p> <p><u>Finding 37</u>: The total local tax levy has been consistently similar in the two districts. (Tables 7.15 &amp; 7.16)</p> <p><u>Finding 38</u>: The 2020-21 true value tax rate is \$18.26 per thousand in Schenevus and \$19.82 per thousand in Worcester. (Table 7.17)</p> <p><u>Finding 39</u>: Schenevus had \$10,114,702 (local share = \$913,188) in outstanding capital debt that will be retired in 2033. Worcester has \$22,511,925 (local share = \$2,797,643) outstanding capital debt that will be retired in 2040. Should the districts merge, it is estimated that this debt would be reduced by \$33,883 with additional Building Aid available to merged districts. (Tables 7.18 &amp; 7.19)</p> <p><u>Finding 40</u>: A merged district would receive \$10,818,809 in Incentive Operating Aid over a fourteen-year period, \$1,138,822 for each of the first five years of the merger. (Table 7.21)</p>	<p><b><i>Recommendation 14: If merged, the Board of Education should closely scrutinize its first budget to ensure that the projected efficiencies are actually achieved following the merger, thus ensuring the local tax relief described in this report.</i></b></p> <p><b><i>Recommendation 15: If merged, the Board of Education should develop a financial plan to ensure long term fiscal stability for the merged district. This plan should give thoughtful consideration to the percentage of Incentive Aid used to reduce the tax burden, particularly in the first five years following merger. The plan should also ensure long term fiscal stability for the district.</i></b></p>
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Finding 41: Considering 33.3% of the total Incentive Operating Aid, additional Building and Transportation Aid, savings from staff reductions and budget efficiencies, loss of BOCES Aid, and the cost of leveling up teacher salaries and additional transportation expense, it is estimated that a merged district would realize savings and additional revenues of \$13,707,960 for the first fourteen years after a merger. (Table 7.25)

Finding 42: Using 33.3% of the Incentive Operating Aid and the other savings outlined in Finding 41, it is estimated that the true value tax rate for the merged district in the first year would be \$16.99 per thousand, a reduction of \$1.27 per thousand in Schenevus and a reduction of \$2.83 per thousand in Worcester. (Table 7.26)

Finding 43: Using the estimates contained in this report, it would take Schenevus four years and Worcester eight years to be back to their current tax rates, assuming an annual tax rate increase of 2%. (Table 7.27)

Finding 44: Tax rates on assessed value would decrease in all of the towns located in both of the school districts. (Table 7.28)