**Merger Study Final Report**

**Wells and and Lake Pleasant Central School Districts**

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***Prepared by***

**Castallo & Silky-*Education Consultants***

**P.O. Box 15100**

**Syracuse, New York 13215**

**June 2011**

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Lake Pleasant Committee Members Wells Committee Members

Julie Atty Sheri Babcock

Joy Eliezer John Collado

Sheila Jazeboski Jean Frederick

Cristen Jones Sharon Parslow

Dickie Mayers Ed Pruden

Barbara Schoonmaker Sandy Stuart

Stephanie Smith Jessica Robinson

Katie Smith Kirsten Tarnowski

Yvonne Snider Nancy Venier

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William D. Silky Alan D. Pole

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Date

**Chapter 1**

**Purpose of the Study**

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.

Another challenge facing school districts in New York State is one of resources. As districts strive to provide more for their students, financial challenges continue to grow in our nation and in New York State in particular. Our national economy is more precarious than it has been in decades. Our state budget is in dire straits facing enormous deficits in the future. Radical cuts in state aid to school districts have been made for the 2011-12 school year. It is clearly time for courageous school leaders to begin discussions about doing business differently.

In the fall of 2010, the Lake Pleasant and Wells boards of education expressed interest in pursuing a study to examine the merger of their two school districts. Both districts approached the State Education Department and the New York State Department of State to secure funding for this study. The districts did receive a state grant to support this study and Wells was designated as the Local Education Agency (LEA) to administer the funding. The districts selected Castallo and Silky-*Education Consultants* from Syracuse to conduct the study. Castallo and Silky has conducted 20 school district merger studies prior to this investigation. In December 2010 and January 2011 each board of education identified members of their respective school communities 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.

The study began in earnest in February 2011 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, co-curricular and extra-curricular), facilities, finances, transportation, and staffing patterns including employee contracts. This report also contains our recommendations for consideration by a new Board of Education should residents of both the Lake Pleasant and Wells Central School Districts approve a merger.

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 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?
* What do similar size districts (to a possible merged district) offer their students?
* 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?
* If money is spent on the present physical plant, what portion of those improved facilities are non-aidable?
* What other options should be considered and what are the implications (cost, travel, space, etc.) for each?
* If new facilities were built, what general locations would be recommended?
* What is the longest bus run (distance/time) for a student in each district today?
* If a new facility were built about half way between the existing facilities, how long would it take to reach the new facility?
* 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?

*Contracts and Staffing*

* What should 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 and Budget*

* 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, 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?

In conducting this study, we examined data from the 2009-10 and, in some cases, the 2010-11 school years. This study took a “snapshot” of the conditions that existed in Lake Pleasant and Wells at that point 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.**Chapter 2**

**Background**

The Lake Pleasant and Wells Central School Districts are located in Hamilton County in the heart of the Adirondack Mountains of New York State, approximately one hour north of Amsterdam, New York. The districts are rural in nature and are communities where the school buildings serve as the hub of school and community activity. There is no major industry in the area, with the school district being the largest employer in each of the communities.

From an economic perspective, the two communities are quite unique. While many residents struggle to make ends meet financially, there is also another segment of the population that lives on Lake Pleasant or has a second home on Lake Pleasant that are much better off from a financial standpoint. In addition, both districts are located in the Adirondack Park and, as a result, possess an unusual amount of property wealth. This creates a situation where the districts are property wealthy but the incomes of most of the residents are relatively low. This property wealth has resulted in both districts having a relatively low full value tax rate when compared with the vast majority of school districts in New York State. Table 2.1 provides a summary overview of each district.

|  |  |  |
| --- | --- | --- |
| **Table 2.1**  **Background Information on the Study Districts** | | |
|  | *Lake Pleasant* | *Wells* |
| Board of Education (year of term expiration) | Chris Hayes, President(2010) Thomas Eakin, Vice-President (2012)  Crysti O’Connor (2009)  Florence Braunius (2011)  Andrew Weaver (2013) | Cathie Rust, President (2012)  David Woodward, Vice-President (2014)  Dorman Reese (2011)  Ken Hoffman (2013)  Colette Tomlinson (2015) |
| Superintendent | Ernest Virgil | John Zeis, Interim |
| 2009-10 Enrollment | 92 | 179 |
| Area of District | 197 square miles | 271 square miles |
| BOCES | Hamilton-Fulton-Montgomery | Hamilton-Fulton-Montgomery |
| Transportation Aid Ratio | 6.5% | 12.4% |
| BOCES Aid Ratio | 36% | 36% |
| Selected Building Aid Ratio | 10% | 31% |
| Combined Wealth Ratio | 3.81700 | 2.10200 |
| Grade Level Configurations | K-9 | K-6 and 7-12 |
| Eligible for Free Lunch | 11% | 15% |
| Eligible for Reduced Price Lunch | 14% | 12% |
| White | 99% | 99% |
| Asian/Hawaiian | 1% |  |
| Multiracial |  | 1% |

Both school districts are components of the Hamilton-Fulton-Montgomery BOCES. Neither of the two study districts currently has representation on their BOCES board of education.

When the merger study has been completed, it will be reviewed by the State Education Department. Following SED approval of the report, presentations on the study will be made to the two boards of education. Ample opportunity for questions and answers will be provided to the boards and their staff. It is anticipated that the boards of education will take time to deliberate about this report and then make their decisions about how to proceed that will serve their districts in the best way.

This merger study has been about the centralization of Lake Pleasant and Wells. In centralization, a new school district is created that encompasses the entire property of the two school districts being merged. A new board of education is elected to oversee the operations of the newly created school district.

Should the Lake Pleasant and Wells 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 will also vote on whether there will be 5, 7, or 9 members on the board of education should the merger vote be successful and whether their terms of office will be 3, 4, or 5 years. If the merger vote is successful in both districts, the votes on the top two propositions regarding board of education structure will be combined from both districts with the results of the total tally prevailing.

Should the residents voting from both school districts approve the merger in the public referendum, the merger of the two school districts is approved. Should the merger vote not receive majority voter approval in both districts, the merger vote fails and the two school districts remain in their current status. Within 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 possible that only that district will need to hold a second vote with the positive vote from the other district remaining valid. Subsequent to a successful merger vote, the Commissioner of Education calls a special meeting in the merged school district in order to elect a new board of education. Once this board of education is elected, it is empowered with all of the authority and responsibility of any other school district board of education to oversee the operations of the new school district.

A merged school district inherits all of the property of the previous two school districts as well as many of the contractual obligations that existed in both of the previous districts. One of the major decisions that the new board of education will make is to hire the new superintendent for the school district. While existing contractual obligations for the sitting superintendents must be honored by the new board of education, neither superintendent has a contractual right to the position of superintendent. The District Superintendent can serve as a valuable resource for the board of education in the process of selecting a superintendent.

Centralized 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, 2012.

**Chapter 3Student 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 2002 through 2009. Enrollment projections are therefore most accurate for 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 Lake Pleasant and Wells from 2002-2009 is shown in the following table:

|  |  |  |
| --- | --- | --- |
| **Table 3.1**  **Number of Live Births, 2002 – 2009** | | |
| Calendar Year | Lake Pleasant | Wells |
| 2002 | 9 | 3 |
| 2003 | 8 | 8 |
| 2004 | 6 | 9 |
| 2005 | 5 | 1 |
| 2006 | 8 | 6 |
| 2007 | 6 | 2 |
| 2008 | 6 | 4 |
| 2009 | 4 | 7 |

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 Lake Pleasant and Wells can now be projected through the 2013-14 school year. Tables 3.2 and 3.3 on the following pages present the projected enrollments for both of the study districts. **NOTE: It is important to point out that column totals of projected K-12 students may not equal the sum of the column (perhaps off by one or two students) due to rounding errors created by the survival ratios.**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 3.2**  **Lake Pleasant Enrollment History and Projections** | | | | | | | | | | | | | | |
| Grade | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | Survival Ratio | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Births 5 Yrs. Prior |  |  | 9 | 8 | 6 | 5 |  | 8 | 6 | 6 | 4 | 6 | 6 | 6 |
| PreK | 9 | 9 | 4 | 8 | 7 | 8 |  |  |  |  |  |  |  |  |
| K | 8 | 7 | 10 | 6 | 5 | 8 | 1.073 | 9 | 6 | 6 | 4 | 6 | 6 | 6 |
| 1 | 8 | 7 | 6 | 8 | 7 | 4 | 0.899 | 7 | 8 | 6 | 6 | 4 | 6 | 6 |
| 2 | 6 | 8 | 8 | 9 | 8 | 7 | 1.128 | 5 | 8 | 9 | 7 | 7 | 4 | 7 |
| 3 | 7 | 6 | 7 | 6 | 10 | 7 | 0.922 | 6 | 4 | 7 | 8 | 6 | 6 | 4 |
| 4 | 8 | 8 | 7 | 9 | 8 | 11 | 1.205 | 8 | 8 | 5 | 9 | 10 | 7 | 7 |
| 5 | 4 | 8 | 5 | 9 | 9 | 7 | 0.957 | 11 | 8 | 7 | 5 | 9 | 9 | 7 |
| 6 | 5 | 6 | 11 | 6 | 13 | 9 | 1.303 | 9 | 14 | 11 | 10 | 6 | 11 | 12 |
| 7 | 7 | 8 | 9 | 14 | 9 | 16 | 1.420 | 13 | 13 | 20 | 15 | 14 | 9 | 16 |
| 8 | 10 | 9 | 8 | 10 | 14 | 9 | 1.079 | 17 | 14 | 14 | 21 | 16 | 15 | 10 |
| 9 | 10 | 10 | 9 | 7 | 9 | 11 | 0.912 | 8 | 16 | 13 | 13 | 19 | 15 | 14 |
| Total K-9 | 73 | 77 | 80 | 84 | 92 | 89 |  | 93 | 99 | 98 | 97 | 97 | 89 | 88 |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| K-6 Total | 46 | 50 | 54 | 53 | 60 | 53 |  | 55 | 56 | 51 | 48 | 47 | 50 | 49 |
| 7-9 Total | 27 | 27 | 26 | 31 | 32 | 36 |  | 38 | 43 | 46 | 49 | 49 | 39 | 39 |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| NOTE 1: Live birth data is only available through 2009. Therefore, from 2015-16 on the live births were estimated at 6 children each year. | | | | | | | | | | | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 3.3**  **Wells Enrollment History and Projections**  **(these projections use birth to kindergarten ratios)** | | | | | | | | | | | | | | |
| Grade | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 |  | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 |
| Births 5 Yrs. Prior |  |  | 3 | 8 | 9 | 1 |  | 6 | 2 | 4 | 7 | 6 | 6 | 6 |
| PreK | 13 | 8 | 10 | 15 | 8 | 11 |  |  |  |  |  |  |  |  |
| K | 5 | 13 | 11 | 15 | 16 | 7 | 3.551 | 21 | 7 | 14 | 25 | 21 | 21 | 21 |
| 1 | 10 | 7 | 14 | 12 | 15 | 15 | 1.101 | 8 | 23 | 8 | 16 | 27 | 23 | 23 |
| 2 | 10 | 11 | 7 | 12 | 14 | 13 | 0.998 | 15 | 8 | 23 | 8 | 16 | 27 | 23 |
| 3 | 10 | 10 | 10 | 5 | 11 | 13 | 0.894 | 12 | 13 | 7 | 21 | 7 | 14 | 24 |
| 4 | 12 | 8 | 11 | 11 | 9 | 11 | 1.160 | 15 | 13 | 16 | 8 | 24 | 8 | 16 |
| 5 | 12 | 12 | 10 | 11 | 13 | 8 | 1.064 | 12 | 16 | 14 | 17 | 8 | 26 | 9 |
| 6 | 13 | 11 | 10 | 10 | 9 | 11 | 0.883 | 7 | 10 | 14 | 13 | 15 | 7 | 23 |
| 7 | 18 | 12 | 11 | 10 | 12 | 11 | 1.069 | 12 | 8 | 11 | 15 | 14 | 16 | 8 |
| 8 | 10 | 19 | 13 | 11 | 10 | 11 | 1.011 | 11 | 12 | 8 | 11 | 15 | 14 | 16 |
| 9 | 8 | 10 | 16 | 11 | 11 | 11 | 0.958 | 11 | 11 | 11 | 7 | 11 | 15 | 13 |
| 10 | 16 | 16 | 16 | 26 | 15 | 18 | 1.645 | 18 | 17 | 18 | 19 | 12 | 18 | 24 |
| 11 | 29 | 18 | 17 | 18 | 26 | 14 | 1.049 | 19 | 19 | 18 | 18 | 20 | 13 | 18 |
| 12 | 17 | 20 | 18 | 17 | 18 | 27 | 0.946 | 13 | 18 | 18 | 17 | 17 | 19 | 12 |
| Total K-12 | 170 | 167 | 164 | 169 | 179 | 170 |  | 173 | 176 | 180 | 194 | 207 | 220 | 232 |
| K-6 Total | 72 | 72 | 73 | 76 | 87 | 78 |  | 89 | 91 | 96 | 106 | 119 | 127 | 140 |
| 7-9 Total | 36 | 41 | 40 | 32 | 33 | 33 |  | 33 | 30 | 30 | 34 | 40 | 44 | 37 |
| 10-12 Total | 62 | 54 | 51 | 61 | 59 | 59 |  | 50 | 54 | 54 | 54 | 49 | 49 | 55 |
| NOTE: From 2015-16 to 2017-18, the estimated live births (6) are the average of the previous 7 years. **The birth to kindergarten ratio (3.551) may be skewed due to the 2010-11 year data (1 birth turning into 7 kindergarten students) thus perhaps artificially inflating future year projections.** | | | | | | | | | | | | | | |

Unfortunately, when examining Wells birth to kindergarten ratio (3.551) we believe this is unnecessarily inflated primarily due to the birth to 2010-11 kindergarten enrollment figures (one birth translating into seven kindergarten students five years later). In speaking with a representative from the New York State Health Department, he confirmed that it did look low and that there are known errors in the Health Department’s database due to birth reporting errors but could not confirm if this specific number was in error. Consequently, we believe that this inflated ratio overestimates all future enrollment projections. Therefore, we have made a second projection using an alternative method of projecting kindergarten enrollments.

Table 3.4 presents this alternative method. In essence, rather than calculating a birth-to-kindergarten ratio for projecting future enrollment, we determined a pre-school-to-kindergarten ratio. In our opinion, this method yields a more accurate and realistic estimate of future enrollments.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 3.4: Wells Enrollment History and Projections**  **(This alternative projection uses pre-school to kindergarten estimates)** | | | | | | | | | | | | | | |
| Grade | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 |  | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 |
| Births 5 Yrs. Prior |  |  | 3 | 8 | 9 | 1 |  | 6 | 2 | 4 | 5 | 6 | 6 | 6 |
| PreK | 13 | 8 | 10 | 15 | 8 | 11 |  | 11 | 11 | 11 | 11 | 11 | 11 | 11 |
| K | 5 | 13 | 11 | 15 | 16 | 7 | 1.204 | 13 | 13 | 13 | 13 | 13 | 13 | 13 |
| 1 | 10 | 7 | 14 | 12 | 15 | 15 | 1.101 | 8 | 15 | 15 | 15 | 15 | 15 | 15 |
| 2 | 10 | 11 | 7 | 12 | 14 | 13 | 0.998 | 15 | 8 | 15 | 15 | 15 | 15 | 15 |
| 3 | 10 | 10 | 10 | 5 | 11 | 13 | 0.894 | 12 | 13 | 7 | 13 | 13 | 13 | 13 |
| 4 | 12 | 8 | 11 | 11 | 9 | 11 | 1.160 | 15 | 13 | 16 | 8 | 15 | 15 | 15 |
| 5 | 12 | 12 | 10 | 11 | 13 | 8 | 1.064 | 12 | 16 | 14 | 17 | 8 | 16 | 16 |
| 6 | 13 | 11 | 10 | 10 | 9 | 11 | 0.883 | 7 | 10 | 14 | 13 | 15 | 7 | 14 |
| 7 | 18 | 12 | 11 | 10 | 12 | 11 | 1.069 | 12 | 8 | 11 | 15 | 14 | 16 | 8 |
| 8 | 10 | 19 | 13 | 11 | 10 | 11 | 1.011 | 11 | 12 | 8 | 11 | 15 | 14 | 16 |
| 9 | 8 | 10 | 16 | 11 | 11 | 11 | 0.958 | 11 | 11 | 11 | 7 | 11 | 15 | 13 |
| 10 | 16 | 16 | 16 | 26 | 15 | 18 | 1.645 | 18 | 17 | 18 | 19 | 12 | 18 | 24 |
| 11 | 29 | 18 | 17 | 18 | 26 | 14 | 1.049 | 19 | 19 | 18 | 18 | 20 | 13 | 18 |
| 12 | 17 | 20 | 18 | 17 | 18 | 27 | 0.946 | 13 | 18 | 18 | 17 | 17 | 19 | 12 |
| Total K-12 | 170 | 167 | 164 | 169 | 179 | 170 |  | 165 | 173 | 177 | 180 | 182 | 187 | 192 |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| K-6 Total | 72 | 72 | 73 | 76 | 87 | 78 |  | 81 | 89 | 93 | 93 | 94 | 94 | 101 |
| 7-9 Total | 36 | 41 | 40 | 32 | 33 | 33 |  | 33 | 30 | 30 | 34 | 40 | 44 | 37 |
| 10-12 Total | 62 | 54 | 51 | 61 | 59 | 59 |  | 50 | 54 | 54 | 54 | 49 | 49 | 55 |
| NOTE: This table uses pre-school enrollments to kindergarten enrollment for projecting. For 2011-12 to 2017-18, pre-school enrollments were estimated as the average of the four years (2007-08 to 2010-11) or 11 students. | | | | | | | | | | | | | | |

Lake Pleasant’s K-9 enrollment has bucked the major trend in most upstate, rural school districts by increasing over the past six years. The K-9 enrollment increased from 73 students in the 2005-06 school year to 89 students this year; although a relatively small number of students (16), it represents a 22% increase. Wells K-12 enrollment (which includes Lake Pleasant’s 10-12 graders) has remained constant. In 2005-06 Wells educated 170 students in grades K-12 the exact same number as this year. K-6 enrollment in Lake Pleasant increased in the past six years from 46 to 53 (15%), and is projected to remain quite constant for the next five to seven years. Enrollment in grades 7-9 in Lake Pleasant increased by 33% in the past six years (27 to 36), and is projected to increase by 36% to 49 in 2015-16. At Wells (using data from Table 3.4), K-6 enrollment increased over the past six years from 72 to 78 (8%) and is projected to increase further over the next five years to 94 (21%). The enrollment in grades 7-8 decreased by 8% in the past six years (36 to 33), but is projected to increase to 37 (12 %) in 2017-18. High school enrollment (grades 10-12) declined slightly by 5% over the past six years (62 to 59) and is projected to decrease by 7% to 55 through 2017-18.

Should the districts decide to merge, Table 3.5 shows the projected enrollment of the merged district. On a combined basis, K-12 enrollments have increased from 243 to 260 students (7%) in the past six years. Also, in the next seven years to 2017-18 combined K-12 enrollment is projected to increase to 281 students, or 8%. Without merger, the 2017-18 enrollments will be 192 (K-12) in Wells and 88 in Lake Pleasant.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 3.5: Combined Enrollment History and Projections**  **(using the alternative kindergarten projections for Wells)** | | | | | | | | | | | | | |
| Grade | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 |
| Births 5 Yrs. Prior |  |  | 12 | 16 | 15 | 6 | 14 | 8 | 10 | 11 | 12 | 12 | 12 |
| PreK | 22 | 17 | 14 | 23 | 15 | 19 |  |  |  |  |  |  |  |
| K | 13 | 20 | 21 | 21 | 21 | 15 | 22 | 19 | 19 | 17 | 19 | 19 | 19 |
| 1 | 18 | 14 | 20 | 20 | 22 | 19 | 15 | 23 | 21 | 21 | 19 | 21 | 21 |
| 2 | 16 | 19 | 15 | 21 | 22 | 20 | 20 | 16 | 24 | 22 | 22 | 19 | 22 |
| 3 | 17 | 16 | 17 | 11 | 21 | 20 | 18 | 17 | 14 | 21 | 19 | 19 | 17 |
| 4 | 20 | 16 | 18 | 20 | 17 | 22 | 23 | 21 | 21 | 17 | 25 | 22 | 22 |
| 5 | 16 | 20 | 15 | 20 | 22 | 15 | 23 | 24 | 21 | 22 | 17 | 25 | 23 |
| 6 | 18 | 17 | 21 | 16 | 22 | 20 | 16 | 24 | 25 | 23 | 21 | 18 | 26 |
| 7 | 25 | 20 | 20 | 24 | 21 | 27 | 25 | 21 | 31 | 30 | 28 | 25 | 24 |
| 8 | 20 | 28 | 21 | 21 | 24 | 20 | 17 | 26 | 22 | 32 | 31 | 29 | 26 |
| 9 | 18 | 20 | 25 | 18 | 20 | 22 | 19 | 27 | 24 | 20 | 30 | 30 | 27 |
| 10 | 16 | 16 | 16 | 26 | 15 | 18 | 18 | 17 | 18 | 19 | 12 | 18 | 24 |
| 11 | 29 | 18 | 17 | 18 | 26 | 14 | 19 | 19 | 18 | 18 | 20 | 13 | 18 |
| 12 | 17 | 20 | 18 | 17 | 18 | 28 | 13 | 18 | 18 | 17 | 17 | 19 | 12 |
| Total K-12 | 243 | 244 | 244 | 253 | 271 | 260 | 248 | 272 | 276 | 279 | 280 | 277 | 281 |
| K-6 Total | 118 | 122 | 127 | 129 | 147 | 131 | 137 | 144 | 145 | 143 | 142 | 143 | 150 |
| 7-9 Total | 63 | 68 | 66 | 63 | 65 | 69 | 61 | 74 | 77 | 82 | 89 | 84 | 77 |
| 10-12 Total | 62 | 54 | 51 | 61 | 59 | 60 | 50 | 54 | 54 | 54 | 49 | 50 | 54 |

District resident students in non-public schools is sometimes an important consideration when projecting future enrollments, especially if there is a large number and possibility of one or more of the non-public schools closing and students returning to the public school system. Table 3.6 shows the number of students in both Lake Pleasant and Wells that have attended non-public schools since 2005-06. It is apparent that since there are virtually no students in either district that attend non-public schools, there is no need to adjust the previous enrollment projections should non-public school return to either of the study districts.

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| **Table 3.6**  **Resident Students in Non-Public Schools from 2005-06 to 2010-11** | | |
| Year | Lake Pleasant | Wells |
| 2005-06 | 0 | 1 |
| 2006-07 | 0 | 1 |
| 2007-08 | 0 | 0 |
| 2008-09 | 0 | 0 |
| 2009-10 | 0 | 0 |
| 2010-11 | 0 | 0 |

Today, a growing number of parents have chosen to educate their children at home. Some school districts have a large number of these “home-schooled children” and should their 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 3.7 provides a summary of the home-schooled students in both Wells and Lake Pleasant Central School Districts.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Table 3.7**  **Home Schooled Students from 2005-06 to 2010-11** | | | | |
| Year | Lake Pleasant | | Wells | |
| Total K-12 | % of total enrollment | Total K-12 | % of total enrollment |
| 2006-07 | 11 | 12.5% | 2 | 1.2% |
| 2007-08 | 10 | 11.1% | 2 | 1.2% |
| 2008-09 | 9 | 9.7% | 2 | 1.2% |
| 2009-10 | 12 | 11.5% | 1 | .5% |
| 2010-11 | 13 | 12.7% | 6 | 3.5% |
| NOTE: All of the home-schooled students in Wells are from one family. In Lake Pleasant this year there are seven families that home school. | | | | |

It is very obvious that Wells has few youngsters being home schooled, however Lake Pleasant has a considerably larger percentage. The majority of those students in Lake Pleasant are educated in this way due to religious beliefs. It is highly unlikely that these children will ever enter the public schools and the remaining small number in both districts, if returned, would have no impact on the districts.

In conclusion, the projected student enrollments have not required adjustment to account for any returning students such as home schooled or non-public school students. Consequently, the projected enrollment numbers in Tables 3.2, 3.4, and 3.5 are best estimates.

**Chapter 4 Instructional Program**

The grade configuration of school districts varies from one district to another. 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 4.1, Lake Pleasant groups grades into three sections--pre-K through 6 (considered elementary school), 7-8 (junior high school) and 9th grade (the first grade of high school; 10th through 12th graders attend Wells). Wells groups its students into two sections—PreK through 6 (considered elementary school) and 7-12 (considered junior-senior high school).

|  |  |
| --- | --- |
| **Table 4.1**  **Grade Configurations of the Study Districts** | |
| Lake Pleasant | Wells |
| Elementary-PK-6 | Elementary-PK-6 |
| Junior High-7-9 | Junior-Senior High-7-12 |
| NOTE: Both Wells and Lake Pleasant have half-day pre-school programs and full-day kindergarten programs. | |

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 (PK-6) and junior/senior high school (7-12).

***Elementary School (PK-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, both districts have their elementary students start at 8 a.m., but the Lake Pleasant student day is 18 minutes longer than Wells elementary students. Staff in the two study districts both begin their workday at about the same time (7:40 a.m. in Lake Pleasant/7:45 a.m. in Wells) and conclude at roughly the same time (3:25 p.m. in Lake Pleasant/3:15 in Wells). The staff day is 15 minutes longer for Lake Pleasant teachers. Consequently, if the districts were to merge there would not be a major adjustment for students or staff.

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| **Table 4.2**  **Daily Elementary Schedules** | | | | |
|  | Lake Pleasant | | Wells | |
| Start/End Times | Length of  Day | Start/End Times | Length of Day |
| Staff Start | 7:40 | 7hr 45 min | 7:45 | 7 hr 30 min |
| Staff End | 3:25 | 3:15 |
|  |  |  |  |  |
| Student Start | 8:00 | 7 hr 18 min | 8:00 | 7 hr 0 min |
| Student End | 3:18\* | 3:00 |
| \*NOTE: Lake Pleasant students in grades K-4 are dismissed at 2:30. | | | | |

Tables 4.3 and 4.4 present a summary of the elementary school sections and average class size of each section.

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| **Table 4.3**  **Elementary Sections/Section Sizes 2010-11** | | | | | |
| Grade Level | Lake Pleasant | | Wells | | Statewide Average 2009-10 |
| # Sections | Section Sizes | # Sections | Section Sizes |  |
| PreK | 1 | 5 | 1 | 11 | 18.4 |
| K | 1 | 8 | 1 | 8 | 20.7 |
| First Grade | 1 | 4 | 1 | 15 | 21.8 |
| Second Grade | 1 | 7 | 1 | 13 | 20.8 |
| Third Grade | 1 | 7 | 1 | 13 | 21.5 |
| Fourth Grade | 1 | 11 | 1 | 12 | 22.2 |
| Fifth Grade | 1 | 7 | 1 | 8 | 22.8 |
| Sixth Grade | 1 | 9 | 1 | 11 | 23.3 |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.4**  **Average Class Sizes** | | | | | | | | |
| Grade Level | Lake Pleasant | | | | Wells | | | |
| 2007-08 | 2008-09 | 2009-10 | 2010-11 | 2007-08 | 2008-09 | 2009-10 | 2010-11 |
| Elementary 1-6 | 7 | 8 | 9 | 8 | 10 | 10 | 12 | 11 |

Examining the data in these two tables shows that Wells elementary class sizes are slightly larger than Lake Pleasant, however it is very apparent that both districts have extremely small elementary class sizes (notice the statewide grade level averages in Table 4.3). Average elementary class sizes have remained constant over the past four years in Wells and Lake Pleasant. Furthermore, there is only one section of each grade in both districts. If a merger were to occur, it would be feasible to combine the sections at each grade level and still have reasonable elementary class sizes.

The heart of every school’s instructional program is its core academic curriculum. Table 4.5 summarizes the elementary curriculum in both study districts. There is significant difference in the curriculum program/materials used in the elementary grades between the two districts with the exception that a MacMillan/McGraw-Hill textbook series is used for social studies in both districts.

|  |  |  |
| --- | --- | --- |
| **Table 4.5**  **Elementary Curriculum** | | |
| Curricular Area | Lake Pleasant | Wells |
| Language Arts | * PreK-Saxon Early Learning (2003) * K-6 Reading-Scott-Foresman Reading Street (2008) | * PreK-6-Macmillan/McGraw Hill Treasurers (2007) |
| Mathematics | * K-6 Math-Scott-Foresman   /Addison Wesley (2002) | * PreK-Innovative Learning Concepts “Touchmath” (2006) * K-3-SRA Real Math (2007) * Gr. 4-6-Sadlier (2006) * Gr. 5-Also uses Pearson, Addison-Wesley |
| Science | * K-6 Science-Scott-Foresman (2006) | * K-6-Macmillan/McGraw Hill (2002) * Gr. 6-Also uses Glencoe |
| Social Studies | * Gr. 1-4-Macmillan/McGraw-Hill (2009) * Gr. 5-6-Scott-Foresman (2005) | * Gr. 1-teacher provided materials * Gr. 2-TFK “Around the World” magazine, Gr. 2: Also uses Time for Kids, Scholastic Read & Write Booklets: Holidays, Scholastic Literacy Activities, & Second Grade Seekers Program. Also, enchangedlearning.com reproducible * Gr. 3, 4, 5, 6-Macmillan/ * McGraw Hill (2005) |
| Music | * Adventures in Music Listening (1996) * Share the Music (2000) |  |

In addition to the core curriculum, each elementary school offers special area subjects to provide a well-rounded education to students. As Table 4.6 illustrates, the core elementary special subjects (art, music and physical education) are taught in each district, however the amount of time students get per week varies considerably between districts.

|  |  |  |
| --- | --- | --- |
| **Table 4.6**  **Elementary Special Area Subjects** | | |
| Special Area Subject | Lake Pleasant | Wells |
| Music | * Kg: 1-45 min/wk and 1-40 min/wk * Gr. 1 & 2: 2-40 min/wk * Gr. 3: 2-45 min/wk * Gr. 4: 2-40 min/wk * Gr. 5: 2-45 min/wk first semester; 2-40 min/wk second semester * Gr. 6: 2-40 min/wk first semester; 2-45 min/wk second semester | * PK & Kg: 2-20 min/wk * Gr. 1: 2-40 min/wk * Gr. 2: 2-30 min/wk * Gr. 3: 2-40 min/wk * Gr. 4: 2-30 min/wk * Gr. 5: 1-40 min/wk * Gr. 6: 5/40 min/wk second quarter |
| Art | * Kg: 1-40 min/wk * Gr. 1 & 2: 2-40 min/wk * Gr. 3: 2-45 min/wk * Gr. 4: 2-40 min/wk * Gr. 5: 2-45 min/wk first semester; 2-40 min/wk second semester * Gr. 6: 2-40 min/wk first semester; 2-45 min/wk second semester | * Kg: 2-30 min/wk * Gr. 2: 2-40 min/wk * Gr. 3: 1-40 min/wk * Gr. 4: see note * Gr. 5: no art * Gr. 6: 4-40 min/wk with study hall |
| Physical Education | * Kg: 5-40 min/wk * Gr. 1 & 2: 3-40 min/wk * Gr. 3 & 4: 3-40 min/wk * Gr. 5 & 6: 3-45 min/wk | * PreK & Kg: 1-25 and 2-30 min/wk * Gr. 1-6: 3-40 min/wk |
| Library | * Kg-6- 1-40 min/wk | * Kg: 2-20 min/wk * Gr. 1-3: 2-20 min/wk * Gr. 4: 2-40 min/wk * Gr. 5: 1-40 min/wk |
| Health | * Intergrated into the curriculum for all grades K-6 | * Kg: 1-30 min/wk * Gr. 4: incorporated in class * Gr. 5: 1-40 min/wk |
| NOTES:  1-In Lake Pleasant, grades 1 and 2 are combined for music, art and PE; grades 3 and 4 are combined for PE; and, grades 5 and 6 are combined for PE.  2-In Lake Pleasant, grade 6 students also receive two periods per week of Spanish  3-In Lake Pleasant, band and chorus begin in grade 5 and instrumental lessons begin at grade 4.  4-in Wells, the PreK-4 teachers integrate art in the classroom throughout the week and year  7-in Wells, grade 5 begins band and chorus  8-in Wells, sixth graders get P.E. three times per week plus another 20 minutes during “B” week. | | |

In Lake Pleasant, some grades are combined for music, art, and/or PE. Grade 6 students in Lake Pleasant are also introduced to Spanish. Wells and Lake Pleasant both begin instrumental music in fifth grade. Also, each district provides its elementary students with library time every week.

Finally, to ensure a 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 grade 3-8. Before presenting recent results for Wells and Lake Pleasant, it is important to understand the rating system currently used in New York. The following summary describes the 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 series of tables (4.7-4.18) present a four-year summary of students scoring at each achievement level in both of the study districts.

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| **Table 4.7**  **Percent of Students Scoring at Each Level**  **English/Language Arts**  **Grade 3** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (7) | Wells  (8) | LP  (6) | Wells  (10) | LP  (7) | Wells  (11) | LP  (6) | Wells  (5) |
| 1 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 1/9 | 0/0 | 0/0 |
| 2 | 0/0 | 2/25 | 1/17 | 2/20 | 0/0 | 2/18 | 0/0 | 1/20 |
| 3 | 7/100 | 5/62 | 3/50 | 6/60 | 3/43 | 7/64 | 5/83 | 3/60 |
| 4 | 0/0 | 1/13 | 2/33 | 2/20 | 4/57 | 1/9 | 1/17 | 1/20 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.8**  **Percent of Students Scoring at Each Level**  **Math**  **Grade 3** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (7) | Wells  (8) | LP  (6) | Wells  (10) | LP  (7) | Wells  (11) | LP  (6) | Wells  (6) |
| 1 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 |
| 2 | 2/28 | 2/25 | 0/0 | 0/0 | 0/0 | 1/9 | 0/0 | 0/0 |
| 3 | 4/57 | 2/25 | 6/100 | 10/100 | 4/57 | 8/73 | 4/67 | 5/83 |
| 4 | 1/14 | 4/50 | 0/0 | 0/0 | 3/43 | 2/18 | 2/33 | 1/17 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.9**  **Percent of Students Scoring at Each Level**  **English/Language Arts**  **Grade 4** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (8) | Wells  (12) | LP  (8) | Wells  (10) | LP  (7) | Wells  (11) | LP  (8) | Wells  (12) |
| 1 | 0 | 0/0 | 0/0 | 0/0 | 1/14 | 0/0 | 0/0 | 0/0 |
| 2 | 1/12 | 5/42 | 3/37 | 2/20 | 1/15 | 1/9 | 1/12 | 2/17 |
| 3 | 7/88 | 7/58 | 5/63 | 6/60 | 5/71 | 8/83 | 7/88 | 9/75 |
| 4 | 0/0 | 0/0 | 0/0 | 2/20 | 0/0 | 2/18 | 0/0 | 1/8 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.10**  **Percent of Students Scoring at Each Level**  **Math**  **Grade 4** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (8) | Wells  (12) | LP  (8) | Wells  (10) | LP  (7) | Wells  (11) | LP  (8) | Wells  (11) |
| 1 | 0 | 0/0 | 1/12 | 0/0 | 0/0 | 0/0 | 0/0 | 1/9 |
| 2 | 1/12 | 3/25 | 0/0 | 0/0 | 1/14 | 1/9 | 1/12 | 1/9 |
| 3 | 4/50 | 6/50 | 7/88 | 6/60 | 4/57 | 6/55 | 5/63 | 8/73 |
| 4 | 3/38 | 3/25 | 0/0 | 4/40 | 2/29 | 4/36 | 2/25 | 1/9 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.11**  **Percent of Students Scoring at Each Level**  **English/Language Arts**  **Grade 5** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (5) | Wells  (11) | LP  (8) | Wells  (12) | LP  (5) | Wells  (11) | LP  (8) | Wells  (14) |
| 1 | 0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 |
| 2 | 1/20 | 0/0 | 3/37 | 4/33 | 0/0 | 3/27 | 0/0 | 0/0 |
| 3 | 3/60 | 8/73 | 5/63 | 7/59 | 5/100 | 6/55 | 4/50 | 12/86 |
| 4 | 1/20 | 3/27 | 0/0 | 1/8 | 0/0 | 2/18 | 4/50 | 2/14 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

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| **Table 4.12**  **Percent of Students Scoring at Each Level**  **Math**  **Grade 5** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (5) | Wells  (11) | LP  (8) | Wells  (12) | LP  (5) | Wells  (12) | LP  (8) | Wells  (13) |
| 1 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 2/17 | 0/0 | 1/8 |
| 2 | 1/20 | 0/0 | 0/0 | 1/8 | 1/20 | 0/0 | 0/0 | 1/7 |
| 3 | 4/80 | 7/64 | 7/87 | 9/75 | 3/60 | 4/33 | 5/62 | 1/8 |
| 4 | 0/0 | 4/36 | 1/13 | 2/17 | 1/20 | 6/50 | 3/38 | 10/77 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.13**  **Percent of Students Scoring at Each Level**  **English/Language Arts**  **Grade 6** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (5) | Wells  (13) | LP  (5) | Wells  (12) | LP  (11) | Wells  (10) | LP  (6) | Wells  (10) |
| 1 | 1/20 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 |
| 2 | 0/0 | 5/38 | 2/40 | 1/8 | 0/0 | 1/10 | 1/17 | 2/20 |
| 3 | 2/40 | 7/54 | 3/60 | 9/75 | 9/82 | 8/80 | 4/66 | 5/50 |
| 4 | 2/40 | 1/8 | 0/0 | 2/17 | 2/18 | 1/10 | 1/17 | 3/30 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.14**  **Percent of Students Scoring at Each Level**  **Math**  **Grade 6** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (5) | Wells  (12) | LP  (5) | Wells  (12) | LP  (11) | Wells  (10) | LP  (6) | Wells  (10) |
| 1 | 1/20 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 |
| 2 | 1/20 | 2/17 | 2/40 | 2/17 | 0/0 | 1/10 | 1/17 | 0/0 |
| 3 | 2/40 | 9/75 | 3/60 | 5/41 | 11/100 | 5/50 | 4/66 | 5/50 |
| 4 | 1/20 | 1/8 | 0/0 | 5/42 | 0/0 | 4/40 | 1/17 | 5/50 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.15**  **Percent of Students Scoring at Each Level**  **English/Language Arts**  **Grade 7** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (7) | Wells  (17) | LP  (7) | Wells  (12) | LP  (10) | Wells  (11) | LP  (14) | Wells  (10) |
| 1 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 |
| 2 | 4/57 | 10/59 | 3/43 | 5/42 | 0/0 | 1/9 | 0/0 | 0/0 |
| 3 | 3/43 | 7/41 | 2/28 | 6/50 | 10/100 | 9/82 | 13/93 | 8/80 |
| 4 | 0/0 | 0/0 | 2/29 | 1/8 | 0/0 | 1/9 | 1/7 | 2/20 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.16**  **Percent of Students Scoring at Each Level**  **Math**  **Grade 7** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (7) | Wells  (17) | LP  (7) | Wells  (12) | LP  (10) | Wells  (11) | LP  (14) | Wells  (10) |
| 1 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 |
| 2 | 5/71 | 6/35 | 3/43 | 5/42 | 0/0 | 0/0 | 0/0 | 0/0 |
| 3 | 2/29 | 9/53 | 4/57 | 6/50 | 6/60 | 9/82 | 7/50 | 8/80 |
| 4 | 0/0 | 2/12 | 0/0 | 1/8 | 4/40 | 2/18 | 7/50 | 2/20 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.17**  **Percent of Students Scoring at Each Level**  **English/Language Arts**  **Grade 8** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (10) | Wells  (9) | LP  (9) | Wells  (18) | LP  (8) | Wells  (12) | LP  (10) | Wells  (11) |
| 1 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 |
| 2 | 3/30 | 1/11 | 3/33 | 7/39 | 2/25 | 3/25 | 2/20 | 0/0 |
| 3 | 7/70 | 8/89 | 5/56 | 11/61 | 5/62 | 8/67 | 7/70 | 9/82 |
| 4 | 0/0 | 0/0 | 1/11 | 0/0 | 1/13 | 1/8 | 1/10 | 2/18 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 4.18**  **Percent of Students Scoring at Each Level**  **Math**  **Grade 8** | | | | | | | | |
| Level | 2005-06 | | 2006-07 | | 2007-08 | | 2008-09 | |
| LP  (10) | Wells  (9) | LP  (9) | Wells  (18) | LP  (8) | Wells  (12) | LP  (10) | Wells  (11) |
| 1 | 0/0 | 2/22 | 1/11 | 0/0 | 1/12 | 0/0 | 0/0 | 0/0 |
| 2 | 3/30 | 2/22 | 0/0 | 5/28 | 1/13 | 4/33 | 0/0 | 1/9 |
| 3 | 6/60 | 3/34 | 7/78 | 13/72 | 5/62 | 7/59 | 9/90 | 10/91 |
| 4 | 1/10 | 2/22 | 1/11 | 0/0 | 1/13 | 1/8 | 1/10 | 0/0 |
| ( ) indicates the number tested; X/X indicates raw count and percentage of total | | | | | | | | |

It is difficult to draw any fair comparisons between the two districts in terms of how elementary and middle school students performed on state test for the four years shown due to the small number of students in each district taking the tests. In some years it appears as if Wells’ students outperformed Lake Pleasant students while other years it is just the opposite. For example, at third grade level Wells students don’t seem to do as well as Lake Pleasant students, in 2008-09 the Lake Pleasant students did not perform as well as the Wells fourth graders on the ELA exam.

In summary, there does not seem to be significant consistent differences (year-to-year) between the two districts in terms of how their elementary and middle school students performed on the state ELA and math assessments.

***High School (Grades 9-12)***

Lake Pleasant and Wells are, in many ways, already operating a merged high school. Students who reside in Wells attend the Wells Central School District from grades Pre-Kindergarten through 12 in the Wells school building. Lake Pleasant students attend school at the Lake Pleasant building from grades Pre-Kindergarten through 9 and then attend the Wells High School for grades 10 through 12. While there are differences in the workday for the teachers in the two districts and in the length of the student day, these issues are irrelevant to the present situation. The only question to be considered in the merger of the two high schools would be whether or not there are benefits from having the ninth grade students in Lake Pleasant attend the Wells High School, just as the Lake Pleasant students in grades 10-12 currently do.

Table 4.19 that follows presents an overview of the curriculum in the combined 10-12 high school in Wells and the separate ninth grades in each district. In addition to identifying the courses taught during 2010-11, the number of sections of each course and each section size is also shown in this table. For example, in Lake Pleasant there is one section of English 9 with 11 students in it; Wells has two sections of English 9 with section sizes of 1 and 12.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Table 4.19**  **High School Course Offerings-2010-11** | | | | |
| Course | | Lake Pleasant | | Wells |
| *ENGLISH* | | | | |
| English 9 | | 11 | | 1, 12 |
| English 10 | |  | | 6, 14 |
| English 11 | |  | | 5, 7 |
| English 12 | |  | | 1, 8 |
| Greek Mythology | |  | | 6 |
| Journalism | |  | | 4 |
| College Prep Writing | |  | | 13 |
| 20TH Century Women’s Lit | |  | | 4 |
| Science Fiction | |  | | 8 |
| *SOCIAL STUDIES* | | | | |
| Global History 9 | | 11 | | 1, 12 |
| Global History 10 | |  | | 16, 1, 4 |
| US History & Government | |  | | 12 |
| Economics (1/2 yr.) | |  | | 16, 8 |
| Participation in Government (1/2 yr.) | |  | | 14, 10 |
| Psychology | |  | | 7 |
| Investments | |  | | 1 |
| AP US History & Government | |  | | 3 |
| *MATHEMATICS* | | | | |
| Integrated Algebra | | 9 | | 11, 1 |
| Algebra | |  | | 7 |
| Geometry | | 5 | | 5, 1, 13 |
| Algebra 2 & Trigonometry | |  | | 5, 1 (Audit) |
| Computer Science | |  | | 2 |
| Pre Calculus | |  | | 4 |
| Calculus | |  | | 4 |
| Business Math | |  | | 2 |
| Business Math II | |  | | 1 |
| *SCIENCE* | | | | |
| Earth Science | | 11 | | 11 |
| Earth Science Lab | | 11 | | 11 |
| Living Environment | |  | | 15, 4 |
| Living Environment Lab | |  | | 5, 7, 7 |
| Chemistry | |  | | 4 |
| Chemistry Lab | |  | | 4 |
| Physics | |  | | 2 |
| Physics Lab | |  | | 2 |
| General Physics | |  | | 7 |
| Nanotechnology | |  | | 4 |
| **Table 4.19 Continued**  **High School Course Offerings-2010-11** | | | | |
| *SCIENCE continued* | | | | |
| Astronomy | |  | | 1 |
| *FOREIGN LANGUAGE* | | | | |
| Spanish 1 | | 9 | | 7 |
| Spanish 2 | | 1 | | 5 |
| Spanish 3 | |  | | 7 |
| Spanish 4 | |  | | 2 |
| Cultural Spanish | |  | | 1 |
| Spanish Mentoring | |  | | 1 |
| *BUSINESS* | | | | |
| Career and Finance | | 11 | | 7 |
| *TECHNOLOGY* | | | | |
| Design & Drawing | | 6, 5 | | 11 |
| Energy Systems | |  | | 7 |
| Technical Drawing | |  | | 11 |
| Transportation Systems | |  | | 6 |
| CAD | |  | | 11 |
| Architectural Drawing | |  | | 6 |
| Alternate Energy | |  | | 2 |
| Manufacturing Systems | |  | |  |
| *HEALTH* | | | | |
| Health 10 |  | | 15 | |
| *FAMILY AND CONSUMER SCIENCE* | | | | |
| Food & Nutrition I | |  | | 9 |
| Food & Nutrition II | |  | | 10 |
| Child Development | |  | | 4 |
| Cultural Foods | |  | | 10 |
| Parenting | |  | | 4 |
| Fitness/Nutrition & Health | |  | | 4 |
| Gourmet Foods | |  | | 6 |
| Pastry & Baking | |  | | 3 |
| *ART* | | | | |
| Studio in Art | |  | | 1, 4 |
| Sculpture/Ceramics | |  | | 1 |
| Photography I | |  | | 1 |
| *MUSIC* | | | | |
| Senior Chorus | |  | | 30 |
| Senior Band | |  | | 18 |
| Band | |  | |  |
| Chorus | |  | |  |
| Jazz Band | |  | | 9 |

|  |  |  |
| --- | --- | --- |
| **Table 4.19 Continued**  **High School Course Offerings-2010-11** | | |
| *MUSIC continued* | | |
| Piano/Voice |  | 1 |
| Piano Lessons |  | 4 |
| Theatre |  | 6 |
| *PHYSICAL EDUCATION* | | |
| High School Phys Ed |  | 16, 12, 6, 13, 1, 17 |
| Adaptive Phys Ed |  | 1 |

The high school students from Lake Pleasant and Wells have a solid program in the core areas of English, math, science, and social studies for districts of their size. Elective courses are available in the core areas in both districts although most of them have small enrollments. Spanish is the only foreign language offered. Spanish also has low class enrollments.

Outside the core academic areas, there are a number of related and elective opportunities for students. However, the enrollments for most of these classes are quite small.

Research on merged school districts has consistently found that academic opportunities for high school students increase after the merger. However, we do not believe this would be the case with Lake Pleasant and Wells. Even if the districts were to merge, we see little change occurring at the high school level. The ninth grade students in Lake Pleasant would certainly take all four years of high school in the merged high school building. We believe that the ninth grade students in Lake Pleasant could easily be accommodated in a high school with all the other high school students. Even if this were to occur, however, there would be only a minor increase in the high school enrollment; the ninth grade class in Lake Pleasant has averaged nine students over the past six years. The research that supports increased academic opportunities for students is based on two high schools merging with a significantly higher enrollment resulting. It is this increased high school enrollment that allows for more classes to be offered. This condition would not occur at the high school in a merger of Lake Pleasant and Wells.

If there is a benefit to the complete merger of the ninth through twelfth grades, it might be reducing the impact of the transition for the Lake Pleasant ninth grade students who go to Wells in tenth grade. The transition from middle school to high school is difficult for some students. The academic rigor of the high school also takes its toll on some young high school students. Moving the Lake Pleasant ninth grade students to Wells would eliminate one more transition for these students.

In addition to the courses listed in Table 4.19 high school students from both districts have access to a variety of Career and Technical Education (CTE) courses from the Hamilton-Fulton-Montgomery BOCES. Eight juniors and nine seniors currently attend CTE programs at the BOCES center. There is also one junior and one senior who are in early admission programs at Fulton-Montgomery Community College. We see no reason why these numbers would change significantly should a merger of the two school districts occur.

There was significant discussion from the committee about its desire to maintain all of the current high school curriculum offerings for the district’s students, even if it meant having very small class sizes. There was further discussion about maintaining equity of opportunity for high school students who spend all of their time in the high school compared with those who attend a career and technical education program for half-day at BOCES. In making determinations of equity, it should be noted that the per student tuition for a half-day career and technical education program at BOCES is $8,040, for which students received 3.5 credits.

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 4.20 that follows provides this data for all students.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Table 4.20**  **Regents Examination Results**  **Lake Pleasant Student Numbers in ( )**  **Number of Students in Bold** | | | | | |
| **Regents Examination** | **Year** | **# Tested** | **% at or above 55%** | **% at or above 65%** | **% at or above 85%** |
| **English** | 07-08 | **16** | 100%-**16** | 94%**-15** | 44%-**7** |
| 08-09 | **17** | 100%-**17** | 94%-**16** | 35%-**6** |
| 09-10 | **24** | 100%-**24** | 92%-**22** | 42%-**10** |
| **Math A** | 07-08 | **9** | 100%-**9** | 100%-**9** | 11%-**1** |
| 08-09 | **NA** | NA | NA | NA |
| 09-10 | **NA** | NA | NA | NA |
| **Math B** | 07-08 | **16** | 81%-**13** | 56%-**9** | 0% |
| 08-09 | **11** | 100%-**11** | 73%-**8** | 9%-**1** |
| 09-10 | **4** | 0% | 0% | 0% |
| **Algebra** | 07-08 | **16 (7)** | 94%-**15** (100%)-(**7**) | 88%-**14** (100%)-(**7**) | 25%-**4** (14%)-(**1**) |
| 08-09 | **15 (6)** | 80%-**12** (100%)-(**6**) | 80%-**12** (83%)-(**5**) | 0% (50%)-(**3**) |
| 09-10 | **15 (9)** | 80%-**12** (100%)-(**9**) | 80%-**12** (100%)-(**9**) | 0% (44%)-(**4**) |
| **Geometry** | 07-08 | **NA** | NA | NA | NA |
| 08-09 | **20 (3)** | 95%-**19** (100%)-(**3**) | 70%-**14** (100%)-(**3**) | 20%-**4** (33%)-(**1**) |
| 09-10 | **11 (4)** | 91%-**10** (100%)-(**4**) | 73%-**8** (100%)-(**4**) | 9%-**1** (75%)-(**3**) |
| **Global History** | 07-08 | **20** | 100%-**20** | 90%-**18** | 60%-**14** |
| 08-09 | **23** | 100%-**23** | 87%-**20** | 57%-**13** |
| 09-10 | **17** | 82%-**14** | 82%-**14** | 47%-**8** |
| **US History** | 07-08 | **18** | 100%-**18** | 100%-**18** | 72%-**13** |
| 08-09 | **14** | 100%-**14** | 100%-**14** | 93%-**13** |
| 09-10 | **26** | 100%-**26** | 96%-**25** | 62%-**16** |
| **Living Environment** | 07-08 | **17** | 100%-**17** | 100%-**17** | 24%-**4** |
| 08-09 | **20** | 100%-**20** | 100%-**20** | 45%-**9** |
| 09-10 | **15** | 93%-**14** | 87%-**13** | 33%-**5** |
| **Earth Science** | 07-08 | **14 (10)** | 100%-**14** (100%)-(**10**) | 71%-**10** (100%)-(**10**) | 36%-**5** (40%)-(**4**) |
| 08-09 | **11 (6)** | 91%-**10** (100%)-(**6**) | 55%-**6** (100%)-(**6**) | 18%-**2** (83%)-(**5**) |
| 09-10 | **13 (8)** | 100%-**13** (100%)-(**8**) | 92%-**12** (100%)-(**8**) | 23%-**3** (50%)-(**4**) |
| **Chemistry** | 07-08 | **8** | 100%-**8** | 88%-**7** | 25%-**2** |
| 08-09 | **7** | 100%-**7** | 71%-**5** | 14%-**1** |
| 09-10 | **12** | 83%-**10** | 58%-**7** | 0% |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Table 4.20 Continued**  **Regents Examination Results**  **Lake Pleasant Student Numbers in ( )**  **Number of Students in Bold** | | | | | |
| **Regents Examination** | **Year** | **# Tested** | **% at or above 55%** | **% at or above 65%** | **% at or above 85%** |
| **Physics** | 07-08 | **6** | 100%-**6** | 83%-**5** | 50%-**3** |
| 08-09 | **1** | 0% | 0% | 0% |
| 09-10 | **2** | 100%-**2** | 100%-**2** | 0% |
| **Spanish** | 07-08 | **6** | 100%-**6** | 100%-**6** | 50%-**3** |
| 08-09 | **7** | 100%-**7** | 100%-**7** | 71%-**5** |
| 09-10 | **5** | 100%-**5** | 60%-**3** | 40%-**2** |

As can be seen in the table above, the performance of Wells High School students on state Regents examinations is quite impressive. These data include all high school students whether they attended elementary and middle school in Lake Pleasant or in Wells. Should the districts decide to merge, we see no impact on student performance on Regents examinations.

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. Modified sports include participation of students in grades 7-9 while students in grades 10-12 play varsity sports.

|  |  |  |
| --- | --- | --- |
| **Table 4.21**  **Interscholastic Athletic Participation-2009-10** | | |
| Sport | Lake Pleasant | Wells |
| Boys Modified Soccer | 10 | 10 |
| Girls Modified Soccer | 12 | 2\* |
| Girls Varsity Soccer |  | 11 |
| Boys Modified Basketball | 10 | 14 |
| Girls Modified Basketball | 12 | 1\* |
| Girls JV Basketball |  | 7 |
| Girls Varsity Basketball |  | 7 |
| Boys Modified Basketball |  | 14 |
| Boys Varsity Basketball |  | 7 |
| Boys Modified Baseball | 10 | 12 |
| Girls Modified Softball | 12 | 4\* |
| Girls Varsity Softball |  | 14 |
| Boys Varsity Baseball |  | 3 |

\* Combined with Lake Pleasant

Table 4.22 that follows presents a summary of the clubs and extracurricular activities offered for the high school students in 2009-10.

|  |  |
| --- | --- |
| **Table 4.22**  **Clubs/Extra-Curricular Activities-2009-10** | |
| Activity | Number of Participants |
| Art Club | 20 |
| Band Club | 43 |
| Drama Club | 40 |
| Creative Writing | 4 |
| Honor Society | 18 |
| International Club | 4 |
| SADD | 12 |
| Senior Chorus | 23 |
| Ski Club | 13 |
| Student Council | 13 |
| Technology Club | 7 |
| Wells Athletic Association | 13 |
| Yearbook | 11 |

In analyzing the tables above regarding athletics and clubs, it is apparent that the students in Wells High School have a reasonable number of opportunities to participate in extra-curricular activities. While most districts are usually willing to start any club in which there is sufficient student interest and a faculty advisor can be secured, we don’t believe that a merger would result in many new clubs being formed. Given that the number of students in the merged high school would be nearly the same as the number of students currently attending Wells High School, we see little opportunity for increasing the number of extra-curricular activities.

Finally, it is important to have an understanding of the special education program in each school district. Table 4.23 that follows summarizes the number of special needs students in Wells and Lake Pleasant, by disability, for the past two academic years. A considerable amount of information can be gleaned from studying this table. For example, New York State typically has a goal for school districts to have no more than 12% of their total student population identified as in need of special education services. However, while this may be a laudable state goal, the identification of students with special needs is a process that varies greatly from district to district for a variety of reasons, one of which may be the philosophy of the district’s Committee on Special Education and/or Committee on Pre-School Special Education. Lake Pleasant’s special education students represent slightly less than 8% of the total district enrollment (7.6% in 2009-10/ 7.8% in 2010-11). In these same two years, Wells identified special needs students are 14.5% and 15.2% for 2009-01 and 2010-11 respectively. This difference is significant and reasons for this will need to be explored. Like all districts, Wells' and Lake Pleasant’s special needs students are predominantly classified as learning disabled. Neither district has an inordinately large percentage of severely disabled students.

If the districts merge, a new Committee on Special Education and Committee on Pre-School Special Education will be formed. There may be some philosophical differences that will have to be addressed to bring consistency in student identification, programming and placement, but we do not see this as a major obstacle.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Table 4.23**  **Lake Pleasant and Wells Special Education Students by Disability**  **2009-10 and 2010-11** | | | | |
| **Disability** | **Lake Pleasant**  **2009-10** | **Wells**  **2009-10** | **Lake Pleasant**  **2010-11** | **Wells**  **2010-11** |
| Autism |  | 3 |  | 2 |
| Emotional Disturbance |  |  |  | 1 |
| Learning Disability | 2 | 17 | 2 | 15 |
| Mental Retardation | 1 | 1 | 1 |  |
| Deafness |  |  |  |  |
| Hearing Impairment |  |  |  |  |
| Speech Impairment | 2 | 1 | 2 | 3 |
| Visual Impairment |  |  |  |  |
| Orthopedic Impairment |  |  |  |  |
| Other Health Impairment | 2 | 4 | 2 | 5 |
| Multiple Disabilities |  |  |  |  |
| Deaf-Blindness |  |  |  |  |
| Traumatic Brain Injury |  |  |  |  |
| Totals | 7 | 26 | 7 | 26 |
| % of Total Students | 7.6% | 14.5% | 7.8% | 15.3% |
| NOTE: These totals do not include pre-school special education students and those identified as 504 students. In 2009-10, Wells had 7 students identified as 504 and 2 pre-K; this current year Wells has 4 504 students and 1 pre-K with special needs. Also note, these figures do not include out-of-district students that are attending district programs. For example, Lake Pleasant is educating six out-of-district special needs students in its district programs this year. | | | | |

**Chapter 5**

**Fiscal Condition of the Districts**

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 5.1 below illustrates, the residents of both Lake Pleasant and Wells consistently support annual spending plans put forth by their respective boards of

education.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 5.1**  **Budget Voting Histories** | | | | | | | | | |
|  | **Lake Pleasant** | | | |  | **Wells** | | | |
| **Year** | **YES** | **NO** | **Total** | **% YES** |  | **YES** | **NO** | **Total** | **% YES** |
| 2000-01 | 170 | 62 | 232 | 73.3 |  | 106 | 73 | 179 | 59.2 |
| 2001-02 |  |  |  |  |  | 173 | 70 | 243 | 71.2 |
| 2002-03 | 163 | 46 | 209 | 78.0 |  | 155 | 65 | 220 | 70.5 |
| 2003-04 | 147 | 25 | 172 | 85.5 |  | 137 | 54 | 191 | 71.7 |
| 2004-05 | 102 | 20 | 122 | 83.6 |  | 134 | 58 | 192 | 69.8 |
| 2005-06 | 116 | 34 | 150 | 77.3 |  | 114 | 57 | 171 | 66.7 |
| 2006-07 | 113 | 38 | 151 | 74.8 |  | 159 | 104 | 263 | 60.5 |
| 2007-08 | 101 | 40 | 141 | 71.6 |  | 136 | 88 | 224 | 60.7 |
| 2008-09 | 103 | 39 | 142 | 72.5 |  | 127 | 24 | 151 | 84.1 |
| 2009-10 | 77 | 39 | 116 | 66.4 |  | 122 | 70 | 192 | 63.5 |
| 2010-11 | 97 | 66 | 163 | 59.5 |  | 147 | 66 | 213 | 69.0 |

Over the past eleven years the budget vote has passed on the first vote in both districts in every year. This is an enviable record of support for school district spending plans that has been shown by both communities.

While further discussion will be undertaken with respect to the school facilities in a later chapter, it should also be noted that community support for capital projects has also been strong in both districts. Additions and renovations to the Wells school facilities were approved in 1996 by a vote of 204 to 197 and in 2004 by a vote of 113 to 53. Lake Pleasant first occupied its new school building in 2002 following a referendum in 1999 that was approved by the community by a vote of 306 to 224.

With respect to the purchase of school buses, the residents of Wells passed a referendum in 1990 by a vote of 214 to 69 to create a bus replacement reserve fund. Since that time, buses have been purchased in Wells through the regular budget and the use of the bus replacement reserve fund. In Lake Pleasant, bus purchases are made from the general fund budget on an as needs basis.

Examination of each district’s general fund balance sheets (Table 5.2) shows that both districts had healthy fund balances on June 30, 2010 (Lake Pleasant, $1,715,974; Wells, $1,010,031). Each district has been able to create and fund reserve accounts for specific purposes such as building repairs and employee benefit liabilities. In terms of undesignated fund balances, Lake Pleasant had $213,214 at year’s end while Wells undesignated fund balance was $256,835. When comparing these undesignated fund balances with the 2010-11 budget for each district, we find that Lake Pleasant’s fund balance represents 4.8% of the 2010-11 budget while the undesignated fund balance in Wells represents 5.2% of its 2010-11 budget.

We must caution that the section 1318 of the real property tax law caps school district undesignated fund balances at 4% of the subsequent year’s budget. While both districts have exceeded this statutory limit, they have done so in an effort to plan carefully for the challenging financial future.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.2**  **District Balance Sheets as of June 30, 2010** | | | |
| **BALANCE SHEET:** | **Lake Pleasant** | **Wells** | **Combined** |
| **ASSETS:** |  |  |  |
| Cash - Unrestricted | $1,014,685 | $511,336 | $1,526,021 |
| Cash - Restricted | $254,478 | $61,599 | $316,077 |
|  | $0 |  |  |
| Accounts Receivable | $117,420 |  | $117,420 |
| Other Receivables | $305,291 | $437,096 | $742,387 |
| Investments |  |  |  |
| Prepaid Expenditures | $24,100 |  | $24,100 |
| **Total Assets** | **$1,715,974** | **$1,010,031** | **$2,726,005** |
| **LIABILITIES:** |  |  |  |
| Accounts payable | $51,361 | $8,329 | $59,690 |
| Accrued Liabilities |  |  |  |
| Due to Other Funds | $50,252 |  | $50,252 |
| Due to Other Govts. |  |  |  |
| Due to Retirement Systems | $139,634 | $155,383 | $295,017 |
| Deferred Revenues |  |  |  |
| **Total Liabilities** | **$241,247** | **$163,712** | **$404,959** |
| **FUND EQUITY:** |  |  |  |
| **Reserved for:** |  |  |  |
| Encumbrances | $47,482 |  | $47,482 |
| Retirement Contribution Reserve |  | $100,000 | $100,000 |
| Unemployment Insurance | $24,844 |  | $24,844 |
| Insurance |  |  |  |
| Capital Reserve | $254,478 | $15,000 | $269,478 |
| Capital Reserve - Buses |  |  |  |
| Liability |  |  |  |
| Tax Certiorari | $6,729 |  | $6,729 |
| Workers' Compensation |  |  |  |
| Repairs | $315,032 | $33,479 | $348,511 |
| Employee Benefit Liability | $8,972 | $376,005 | $384,977 |
| Debt Service |  |  |  |
| **Reserved Fund Balance** | **$657,537** | **$524,484** | **$1,182,021** |
| **Unreserved:** |  |  |  |
| Designated for subsequent year's expenditures | $523,976 | $65,000 | $588,976 |
| Undesignated | $213,214 | $256,835 | $470,049 |
| **Unreserved Fund Balance** | **$737,190** | **$321,835** | **$1,059,025** |
|  |  |  |  |
| **Total Fund Equity** | **$1,394,727** | **$846,319** | **$2,241,046** |
|  |  |  |  |
| **TOTAL LIABILITIES AND FUND BALANCE** | **$1,715,974** | **$1,010,031** | **$2,726,005** |

Other observations should be made about the balance sheet shown above in Table 5.2. In terms of future capital project initiatives, both districts have funded capital reserve accounts, Lake Pleasant at $254,478 and Wells at $15,000. Should a merger occur, a total of $269,478 would reside in the capital reserve account.

Lake Pleasant has funded a tax certiorari account in the amount of $6,729. This is to protect the district from one private resident who consistently challenges her assessment. Employee benefit liability reserves have also been created in both districts with Lake Pleasant having $8,972 and Wells having $376,005. Should a merger occur, there would be $384,977 in the employee benefit reserve account. Finally, it is important to note that Lake Pleasant has a unemployment reserve of $24,844.

Regional Boards of Cooperative Educational Services (BOCES) provide services to school districts within their geographic region. Hamilton-Fulton-Montgomery BOCES serves both Lake Pleasant and Wells. Services include 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. Both districts have a BOCES aid ratio of 36%. The following table provides an overview of some of the administrative and program costs that are charged by the BOCES.

|  |  |  |
| --- | --- | --- |
| **Table 5.3**  **Administrative Costs and Services Received from HFM BOCES-2009-10** | | |
| Service | Lake Pleasant | Wells |
| Administration | $7,891 | $11,563 |
| Facilities Rental | $2,129 | $3,120 |
| New BOCES Facility | $9,136 | $13,654 |
| Career & Technical Education/student | $8,000 (8) | $8,000 (9) |
| Special Education-PACE/student |  | $28,040(2) |
| Special Education-Multiply Disabled/student |  | $32,535 (1) |
| Distance Learning Network |  | $47,507 |
| Health-Safety Risk Management | $9,995 | $9,995 |
| Central Data Processing | $36,181 | $80,718 |

Table 5.4 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 in subsequent years, it typically means that there has been prudent fiscal management. Both districts’ fund balances have increased substantially to ensure the fiscal health of the district as challenging fiscal years approach. Lake Pleasant’s fund balance has increased by 36.8% over the past five years while the fund balance in Wells has increased by 87.6% over the same five-year period.

|  |  |  |
| --- | --- | --- |
| **Table 5.4** | | |
| **History of Total Fund Balance for Lake Pleasant and Wells** | | |
| June 30th of Fiscal Year | **Lake Pleasant** | **Wells** |
| 2005-2006 | $1,019,276 | $451,019 |
| 2006-2007 | $1,088,039 | $573,349 |
| 2007-2008 | $1,209,879 | $674,068 |
| 2008-2009 | $1,272,239 | $594,833 |
| 2009-2010 | $1,394,727 | $846,319 |

We have also reviewed the report of the independent auditor for the school year ending June 30, 2010. Both districts use Marvin & Company for conducting the required annual audit. Marvin & Company has an office in Latham and is a firm that has had significant experience in conducting school district audits. 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 audits from both school districts reflect only minor issues with internal controls in the management letters. They show two districts that are in good financial condition, that have planned for the challenging fiscal times ahead, whose financial affairs are very well managed, and whose procedures for ensuring that the public’s money is being well spent and well protected are very much in place. However, school districts have never faced the types of financial challenges that they now confront. State aid to education is being drastically cut. Programs are being eliminated. Fund balances are being eaten up 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 challenging financial futures. These are the very real challenges that are facing Lake Pleasant and Wells. While they have managed their money well and are in a satisfactory fiscal condition today, the future is very bleak.

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 5.5 examines the total approved operating expenses for both districts for the past five years. Approved Operating Expenses 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, capital debt, etc.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.5** | | | |
| **Total Approved Operating Expenses** | | | |
| Year | Lake Pleasant | Wells | If Combined |
| 2005-06 | $2,120,887 | $3,183,220 | $5,304,107 |
| 2006-07 | $2,187,376 | $3,351,001 | $5,538,377 |
| 2007-08 | $2,290,123 | $3,538,807 | $5,828,930 |
| 2008-09 | $2,289,275 | $3,572,321 | $5,861,596 |
| 2009-10 | $2,606,751 | $3,746,852 | $6,353,603 |

This table shows that both districts have increased their operating expenses for each of the previous five years up to 2009-10. This is consistent with school spending across all of New York State as salaries, fringe benefits, and utility costs have increased dramatically for school districts.

In order to compare school spending between the two districts in a more equitable fashion, Table 5.6 is presented to examine the operating expenses per student.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.6** | | | |
| **Approved Operating Expenses Per Student** | | | |
| Year | Lake Pleasant | Wells | If Combined |
| 2006 | $29,053 | $18,725 | $21,828 |
| 2007 | $28,407 | $20,066 | $22,698 |
| 2008 | $28,627 | $21,578 | $23,889 |
| 2009 | $27,253 | $21,138 | $23,168 |
| 2010 | $28,334 | $20,932 | $23,445 |

As the table shows, over the past five years, Lake Pleasant has outspent Wells on a per student basis from its operating budget in every year since 2006. It is not at all unusual to find a smaller district having higher per student costs than a larger district simply because of economies of scale. Note too that, if merged in the past five years, the spending per pupil would have declined for Lake Pleasant students but increased for Wells students. Given this analysis, however, with the range of operating expenses per pupil in school districts across the state, the spending levels of these two districts are somewhat similar.

Theoretically, state aid to education in New York is supposed to help less wealthy districts derive more fiscal equity with those districts that have greater fiscal capacity. To some degree this occurs. However, the system is not perfect. In fact, small rural school districts are not able to spend the same amount of money on the education of their children as most other districts in the state. It is important however to examine how much state support each district receives since most small, rural districts are highly dependent on fiscal support from the state. The table below illustrates the state aid that Lake Pleasant and Wells have received over the past six years. The years cited are for the year of expense.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.7** | | | |
| **Total State Aid** | | | |
| Year | Lake Pleasant | Wells | If Combined |
| 2005-2006 | $369,029 | $808,309 | $1,177,338 |
| 2006-2007 | $439,768 | $912,684 | $1,352,452 |
| 2007-2008 | $548,703 | $1,065,945 | $1,614,648 |
| 2008-2009 | $635,584 | $1,227,542 | $1,863,126 |
| 2009-2010 | $600,768 | $1,075,913 | $1,676,681 |
| 2010-2011 | $588,135 | $1,040,156 | $1,628,291 |

As can be seen from Table 5.7, state aid increased for both districts from 2005-06 through 2008-09. In 2009-10 and this current year, state aid has decreased for both districts. Over the six-year period studied, state aid for Lake Pleasant increased by 59.4% and for Wells by 28.7%.

Once again, it is important to examine the amount of state aid received per student in order to get a more accurate comparison between the two districts. Table 5.8 provides these data.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.8** | | | |
| **State Aid Per Enrolled Student** | | | |
| Year | Lake Pleasant | Wells | If Combined |
| 2005-2006 | $5,055 | $4,755 | $4,845 |
| 2006-2007 | $5,711 | $5,465 | $5,543 |
| 2007-2008 | $6,859 | $6,500 | $6,617 |
| 2008-2009 | $7,566 | $7,264 | $7,364 |
| 2009-2010 | $6,530 | $6,011 | $6,187 |
| 2010-2011 | $6,608 | $6,119 | $6,287 |

Examining these figures we see a familiar pattern. State aid per student increased in five of the past six years for both districts. Wells and Lake Pleasant saw a decline in 2009-10. Again, however, this state aid per student is relatively similar for these two school districts.

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 shown as the Combined Wealth Ratio. The average district in the state has a Combined Wealth Ratio of 1.0. The Combined Wealth Ratio for Lake Pleasant is 3.817 and for Wells, it is 2.102. Being significantly greater than 1.0, these data for the study districts mean that they are much more wealthy than the average school district in the state. It is important to note however, that this high Combined Wealth Ratio is due to extreme *property* wealth, not *income* wealth. This is due to being in the Adirondack Park and expensive lake summer homes owned by summer residents. However, while they are wealthier than the average school district in the state, they are quite similar to each other in this regard. We will illustrate this below.

For purposes of this study, we will examine the property wealth of the two districts and illustrate that information in Table 5.9 as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.9** | | | |
| **Full Value Property Wealth** | | | |
| Year | Lake Pleasant | Wells | If Combined |
| 2005 | $344,427,789 | $260,327,609 | $604,755,398 |
| 2006 | $373,520,676 | $342,086,706 | $715,607,382 |
| 2007 | $421,309,049 | $351,950,316 | $773,259,365 |
| 2008 | $482,309,049 | $358,704,489 | $841,013,538 |

As is the case with every other financial comparison that has been made, we find the two districts to be quite similar when comparing the full value property wealth, with Lake Pleasant somewhat higher than Wells. This is one of the major reasons why the state aid to the two school districts is also fairly similar. We now look at the property value per enrolled student in the following Table 5.10.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.10** | | | |
| **Property Value Per Enrolled Student** | | | |
| Year | Lake Pleasant | Wells | If Combined |
| 2005 | $4,718,189 | $1,531,339 | $2,488,705 |
| 2006 | $4,850,918 | $2,048,423 | $2,932,817 |
| 2007 | $5,266,363 | $2,146,039 | $3,169,096 |
| 2008 | $5,741,774 | $2,122,512 | $3,324,164 |

Table 5.10 shows that there is considerably more property wealth per student in Lake Pleasant than in Wells. This is partly a function of the size of the districts. There are fewer students enrolled in Lake Pleasant causing the property value per student to be higher.

We now look at the property tax levy for each of the districts in the following, Table 5.11.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.11** | | | |
| **Total Property Tax Levy** | | | |
| Year | Lake Pleasant | Wells | If Combined |
| 2006-07 | $2,858,605 | $3,294,717 | $6,153,322 |
| 2007-08 | $2,848,455 | $3,194,717 | $6,043,172 |
| 2008-09 | $2,873,614 | $3,194,681 | $6,068,295 |
| 2009-10 | $3,061,354 | $3,448,286 | $6,509,640 |
| 2010-11 | $3,114,132 | $3,503,181 | $6,617,313 |

It is interesting to note that Lake Pleasant’s tax levy declined slightly from 2006-07 to 2007-08 and has gradually increased slightly since. Wells has experienced a similar pattern decreasing from 2006-07 to 2007-08, remained stable the next year and then has increased the last two years.

Table 5.12 shows the tax levy per student for the two districts.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.12** | | | |
| **Property Tax Levy Per Enrolled Student** | | | |
| Year | Lake Pleasant | Wells | If Combined |
| 2006-07 | $37,125 | $19,729 | $25,219 |
| 2007-08 | $35,606 | $19,480 | $24,767 |
| 2008-09 | $34,210 | $18,903 | $23,985 |
| 2009-10 | $33,276 | $19,264 | $24,021 |
| 2010-11 | $34,990 | $20,607 | $25,549 |

In looking at the tax levy per student, we notice that Lake Pleasant’s levy per student declined in four of the five years shown, only increasing for the current year. Wells tax levy per student declined the first three years, then saw in increase over the past two. Over the six-year period studied, the levy per student has decreased by 5.8% in Lake Pleasant and increased in Wells by 4.5%.

Finally, with respect to taxes, we examine the true value tax rates of both districts in the following Table 5.13. True value tax rates are the only way to compare one district with another because of assessment practices. These tax rates are not 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.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.13** | | | |
| **Tax Rates on True Value** | | | |
| Year | Lake Pleasant | Wells | If Combined |
| 2005-06 | $9.78 | $11.97 |  |
| 2006-07 | $7.94 | $9.63 |  |
| 2007-08 | $7.83 | $9.08 |  |
| 2008-09 | $7.80 | $8.91 |  |
| 2009-10 | $6.84 | $8.66 |  |
| 2010-11 | $7.00 | $9.05 | $7.84 |

As can be seen from the table above, both districts have reduced their true value tax rate over the past six years. The tax rate in Lake Pleasant has gone down by 28.4% while Wells has reduced its tax rate by 28.0%. Once again, in comparing financial information on the two study districts, we find that they are very similar. If the districts had merged on July 1, 2010 the combined tax rate this year would have been $7.84 with all other things remaining the same (i.e., no additional incentive aid to reduce taxes).

It is important for each district to know the extent of debt the other district would bring to a merger if it were to occur. The following tables (5.14 and 5.15) show the schedule of indebtedness each of the districts currently holds. Lake Pleasant has $5,358,876 in principal and interest (P+I) payments due over the next 21 years while Wells capital debt is $1,742,141 and will be retired in 2022.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Table 5.14**  **Lake Pleasant Building Debt** | | | | | |
| Year Ending June 30 | Principal | Interest | Annual Total P+I | Amortized Building Aid | Estimated Local Share |
| 2011 | $251,797 | $196,172 | $447,969 | $57,132 | $390,837 |
| 2012 | $263,000 | $183,295 | $446,295 | $57,132 | $389,163 |
| 2013 | $273,000 | $169,888 | $442,888 | $57,132 | $385,756 |
| 2014 | $284,000 | $155,944 | $439,944 | $57,132 | $382,812 |
| 2015 | $304,000 | $141,214 | $445,214 | $57,132 | $388,082 |
| 2016 | $309,000 | $125,859 | $434,859 | $57,132 | $377,727 |
| 2017 | $329,000 | $109,649 | $438,649 | $57,132 | $381,517 |
| 2018 | $344,000 | $93,024 | $437,024 | $57,132 | $379,892 |
| 2019 | $360,000 | $75,222 | $435,222 | $57,132 | $378,090 |
| 2020 | $385,000 | $56,163 | $441,163 | $57,132 | $384,031 |
| 2021 | $395,000 | $35,887 | $430,887 | $57,132 | $373,755 |
| 2022 | $421,000 | $14,428 | $435,428 | $57,132 | $378,296 |
| 2023 | $6,000 | $3,211 | $9,211 | $57,132 | -$47,921 |
| 2024 | $6,000 | $2,900 | $8,900 | $57,132 | -$48,232 |
| 2025 | $7,000 | $2,575 | $9,575 | $57,132 | -$47,557 |
| 2026 | $7,000 | $2,225 | $9,225 | $57,132 | -$47,907 |
| 2027 | $7,000 | $1,875 | $8,875 | $57,132 | -$48,257 |
| 2028 | $8,000 | $1,500 | $9,500 | $57,132 | -$47,632 |
| 2029 | $8,000 | $1,100 | $9,100 | $57,132 | -$48,032 |
| 2030 | $8,000 | $700 | $8,700 | $6,276 | $2,424 |
| 2031 | $10,000 | $250 | $10,250 | $6,276 | $3,974 |
|  |  |  | $5,358,876 | $1,098,060 |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Table 5.15**  **Wells Building Debt** | | | | | |
| Year Ending June 30 | Principal | Interest | Annual Total P+I | Amortized Building Aid | Estimated Local Share |
| 2013 | $170,000 | $65,571 | $235,571 | $71,916 | $163,654 |
| 2014 | $175,000 | $57,541 | $232,541 | $71,916 | $160,625 |
| 2015 | $180,000 | $49,278 | $229,278 | $71,916 | $157,361 |
| 2016 | $110,000 | $40,758 | $150,758 | $48,098 | $102,660 |
| 2017 | $115,000 | $35,642 | $150,642 | $48,098 | $102,544 |
| 2018 | $120,000 | $30,296 | $150,296 | $48,098 | $102,198 |
| 2019 | $125,000 | $24,716 | $149,716 | $48,098 | $101,618 |
| 2020 | $130,000 | $18,902 | $148,902 | $48,098 | $100,804 |
| 2021 | $135,000 | $12,858 | $147,858 | $48,098 | $99,760 |
| 2022 | $140,000 | $6,580 | $146,580 | $48,098 | $98,482 |
|  | **$1,400,000** | **$342,141** | **$1,742,141** | **$552,437** | **$1,189,704** |

The current building aid ratio for Lake Pleasant is 10% while the building aid ratio for Wells is 31%. This means that the state reimburses Lake Pleasant $0.10 and Wells $0.31 on every dollar spent for approved building project expenses. When school districts merge, 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. Neither Wells or Lake Pleasant would greatly benefit from the additional incentive building aid for, as mentioned above, the districts are property wealthy and therefore have low capital building aid ratios. The local taxpayer would still have to assume the majority of the costs for capital work despite the additional aid a merged district would receive. This incentive exists for a period of ten years from the official date of the merger. In addition, as noted earlier in this chapter, should the merged district undertake a new capital project, a capital reserve account in the amount of $269,478 would also exist.

The second financial incentive for 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 merged 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 Lake Pleasant current building aid ratio of 10% would be aided at Wells’ current building aid rate of 31% if the two districts merged. Table 5.16 shows the history of building aid ratios for both study districts.

|  |  |  |
| --- | --- | --- |
| **Table 5.16**  **Building Aid Ratios** | | |
| Lake Pleasant | Wells | Voter Approval Date |
| 0.051 | 0.310 | Prior to 7/1/98 |
| 0.051 | 0.410 | On or after 7/1/98 but prior to 7/1/00 |
| 0.100 | 0.310 | On or after 7/1/00 but prior to 7/1/05 |
| 0.100 | 0.310 | On or after 7/1/05 |

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 Lake Pleasant, this operating aid is $34,800 and for Wells the 2006-07 operating aid is $76,400. In calculating the incentive operating aid, the state adds the operating aids of the two districts together and then increases 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 5.17 that follows shows the incentive operating aid that would be paid to the merged district. As can be seen from this table, a merged district of Lake Pleasant and Wells would generate $422,560 in additional state aid over the next fourteen years.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.17**  **Incentive Operating Aid for Merged District** | | | |
| Year of Merger | Combined Operating Aid for Both Districts  (2006-07) | Incentive Operating Aid Percentage | Incentive Operating Aid |
| 2012-13 (1) | $111,200 | 40% | $44,480 |
| 2013-14 (2) | $111,200 | 40% | $44,480 |
| 2014-15 (3) | $111,200 | 40% | $44,480 |
| 2015-16 (4) | $111,200 | 40% | $44,480 |
| 2016-17 (5) | $111,200 | 40% | $44,480 |
| 2017-18 (6) | $111,200 | 36% | $40,032 |
| 2018-19 (7) | $111,200 | 32% | $35,584 |
| 2019-20 (8) | $111,200 | 28% | $31,136 |
| 2020-21 (9) | $111,200 | 24% | $26,688 |
| 2021-22 (10) | $111,200 | 20% | $22,240 |
| 2022-23 (11) | $111,200 | 16% | $17,792 |
| 2023-24 (12) | $111,200 | 12% | $13,344 |
| 2024-25 (13) | $111,200 | 8% | $8,896 |
| 2025-26 (14) | $111,200 | 4% | $4,448 |
| 2026-27 (15) | $111,200 | 0% | $0 |
| **TOTAL INCENTIVE OPERATING AID** | | | **$422,560** |

Table 5.18 that follows shows the impact of applying the incentive operating aid to the true value tax rate. Without the incentive operating aid, the tax rate in the merged district would be $7.85 per thousand in the first year of a merger. This would likely represent a tax *increase* for residents of Lake Pleasant and a slight tax *decrease* for Wells’ property owners. Applying all of the incentive operating aid to the tax levy would reduce the true tax rate to $7.79 for the first five years. If the districts merge in 2012-13, and if *all* of the incentive operating aid had is used to reduce the local tax levy, the true value tax rate would only be reduced slightly.

In examining Table 5.18, it should be noted that the chart is for illustrative purposes only. The full value property wealth has been held constant as has the tax levy. In reality, these figures will both change every year. However, for purposes of illustrating the impact of incentive operating aid, including its declining amount, Table 5.18 is appropriate.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 5.18** | | | | | | | |
| **Impact of Incentive Operating Aid (IOA) on True Tax Rate** | | | | | | | |
| Year of Merger | Full Value Property Wealth | Tax Levy w/o IOA | True Tax Rate w/o IOA | Incentive Operating Aid | Tax Levy with IOA | True Tax Rate with IOA | Change in Tax Rates |
| 12-13 (1) | $843,347,986 | $6,617,313 | $7.85 | $44,480 | $6,572,833 | $7.79 | $0.05 |
| 13-14 (2) | $843,347,986 | $6,617,313 | $7.85 | $44,480 | $6,572,833 | $7.79 | $0.05 |
| 14-15 (3) | $843,347,986 | $6,617,313 | $7.85 | $44,480 | $6,572,833 | $7.79 | $0.05 |
| 15-16 (4) | $843,347,986 | $6,617,313 | $7.85 | $44,480 | $6,572,833 | $7.79 | $0.05 |
| 16-17 (5) | $843,347,986 | $6,617,313 | $7.85 | $44,480 | $6,572,833 | $7.79 | $0.05 |
| 17-18 (6) | $843,347,986 | $6,617,313 | $7.85 | $40,032 | $6,577,281 | $7.80 | $0.05 |
| 18-19 (7) | $843,347,986 | $6,617,313 | $7.85 | $35,584 | $6,581,729 | $7.80 | $0.04 |
| 19-20 (8) | $843,347,986 | $6,617,313 | $7.85 | $31,136 | $6,586,177 | $7.81 | $0.04 |
| 20-21 (9) | $843,347,986 | $6,617,313 | $7.85 | $26,688 | $6,590,625 | $7.81 | $0.03 |
| 21-22 (10) | $843,347,986 | $6,617,313 | $7.85 | $22,240 | $6,595,073 | $7.82 | $0.03 |
| 22-23 (11) | $843,347,986 | $6,617,313 | $7.85 | $17,792 | $6,599,521 | $7.83 | $0.02 |
| 23-24 (12) | $843,347,986 | $6,617,313 | $7.85 | $13,344 | $6,603,969 | $7.83 | $0.02 |
| 24-25 (13) | $843,347,986 | $6,617,313 | $7.85 | $8,896 | $6,608,417 | $7.84 | $0.01 |
| 25-26 (14) | $843,347,986 | $6,617,313 | $7.85 | $4,448 | $6,612,865 | $7.84 | $0.01 |
| 26-27 (15) | $843,347,986 | $6,617,313 | $7.85 | $0 | $6,617,313 | $7.85 | $0.00 |

In spite of these calculations, it is rare that a merged school district would apply all of its incentive operating aid to reduce taxes; and we 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 taxes can be stabilized over an extended period of time. While decisions about the allocation of resources are left solely to the discretion of the new board of education, it is not unusual for boards to divide the incentive operating aid into three relatively equal priorities. These priorities are:

1. Using funds to pay for transition costs and starting up 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, adjusting salaries, buying new uniforms, developing a new policy manual, etc.

2. Using aid to fund reserves to ensure the long-term fiscal stability of the merged district; $14,827 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 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.

3. Using funds to reduce taxes.

In the event that the merged school district decided to allocate the incentive operating aid in the manner described in the chart above, 1/3 of the incentive operating aid would be used to reduce taxes. This means that in the first five years of the merger, $74,135 would be used to reduce the local tax levy. Starting in year six, this amount would decrease as described above. Table 5.19 that follows shows the effect of applying 1/3 of the incentive operating aid to reduce local taxes.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 5.19** | | | | | | | |
| **Impact of 1/3 Incentive Operating Aid (IOA) on True Tax Rate** | | | | | | | |
| Year of Merger | Full Value Property Wealth | Tax Levy without 1/3 IOA | True Tax Rate w/o IOA | 1/3 Incentive Operating Aid | Tax Levy with 1/3 IOA | True Tax Rate with 1/3 IOA | Change in Tax Rates |
| 12-13 (1) | $843,347,986 | $6,617,313 | $7.85 | $14,827 | $6,602,486 | $7.83 | $0.02 |
| 13-14 (2) | $843,347,986 | $6,617,313 | $7.85 | $14,827 | $6,602,486 | $7.83 | $0.02 |
| 14-15 (3) | $843,347,986 | $6,617,313 | $7.85 | $14,827 | $6,602,486 | $7.83 | $0.02 |
| 15-16 (4) | $843,347,986 | $6,617,313 | $7.85 | $14,827 | $6,602,486 | $7.83 | $0.02 |
| 16-17 (5) | $843,347,986 | $6,617,313 | $7.85 | $14,827 | $6,602,486 | $7.83 | $0.02 |
| 17-18 (6) | $843,347,986 | $6,617,313 | $7.85 | $13,344 | $6,603,969 | $7.83 | $0.02 |
| 18-19 (7) | $843,347,986 | $6,617,313 | $7.85 | $11,861 | $6,605,452 | $7.83 | $0.01 |
| 19-20 (8) | $843,347,986 | $6,617,313 | $7.85 | $10,379 | $6,606,934 | $7.83 | $0.01 |
| 20-21 (9) | $843,347,986 | $6,617,313 | $7.85 | $8,896 | $6,608,417 | $7.84 | $0.01 |
| 21-22 (10) | $843,347,986 | $6,617,313 | $7.85 | $7,413 | $6,609,900 | $7.84 | $0.01 |
| 22-23 (11) | $843,347,986 | $6,617,313 | $7.85 | $5,931 | $6,611,382 | $7.84 | $0.01 |
| 23-24 (12) | $843,347,986 | $6,617,313 | $7.85 | $4,448 | $6,612,865 | $7.84 | $0.01 |
| 24-25 (13) | $843,347,986 | $6,617,313 | $7.85 | $2,965 | $6,614,348 | $7.84 | $0.00 |
| 25-26 (14) | $843,347,986 | $6,617,313 | $7.85 | $1,483 | $6,615,830 | $7.84 | $0.00 |
| 26-27 (15) | $843,347,986 | $6,617,313 | $7.85 | $0 | $6,617,313 | $7.85 | $0.00 |

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 is 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 occur nor that the process, if implemented, occur in one year. Often times, 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 preparing this summary, the following factors will be examined:

* Incentive Operating Aid-extra state aid that the districts would receive by merging
* Incentive Building Aid-extra state aid the merged district would receive to assist in paying off their existing building debt
* Budget efficiencies due to the merger-legal and auditing services, memberships, dues, and other budgetary duplications that can be eliminated because of the merger (see Appendix for memo with complete listing)
* School lunch fund-beginning to charge students for breakfast and lunch would generate revenue for the merged district. The amount of savings listed in the table assumes that sufficient revenue could be generated to cover all food services and that the general fund would no longer subsidize the school lunch fund.
* Potential staff reductions-positions that could be eliminated as a result of a merger
* Administrative efficiencies-savings that would result from eliminating one superintendent’s position and replacing it with a principal position
* Loss of Transportation State Aid-the loss of state transportation aid due to a merger and the new district’s state transportation aid ratio now being lower than Well’s current state transportation aid ratio
* Leveling up salaries-increasing teacher salaries 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 base amount and the percentages for calculating incentive operating remain the same as identified in this study.

2. The savings due to budget efficiencies and beginning to generate local revenue by charging for school lunches have been held constant.

3. 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 held constant.

By holding all of the current values constant in analyzing the financial impact of the merger, conservative future year estimates are projected. It is understood that many of these figures will change in the out years. Since there are more areas where resources are saved than where additional costs are likely to be incurred, holding current figures constant will provide the most conservative estimate of savings that would accrue to the merged school district. Table 5.20 that follows provides a complete look at the financial

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 5.20**  **Financial Analysis for Merged District** | | | | | | | | | |
| Year | Incentive Operating Aid | Adjusted Building Aid | Budget Efficiencies | School Lunch Fund | Reduction of Two Teachers | Administrative Efficiency | Loss of Transportation Aid | Leveling Up of Teacher Salaries & Benefits | Total |
| 2012-13 | 44,480 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 521,958 |
| 2013-14 | 44,480 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 521,958 |
| 2014-15 | 44,480 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 521,958 |
| 2015-16 | 44,480 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 521,958 |
| 2016-17 | 44,480 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 521,958 |
| 2017-18 | 40,032 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 517,510 |
| 2018-19 | 35,584 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 513,062 |
| 2019-20 | 31,136 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 508,614 |
| 2020-21 | 26,688 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 504,166 |
| 2021-22 | 22,240 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 499,718 |
| 2022-23 | 17,792 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 495,270 |
| 2023-24 | 13,344 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 490,822 |
| 2024-25 | 8,896 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 486,374 |
| 2025-26 | 4,448 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 481,926 |
| 2026-27 | 0 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 477,478 |
| 2027-28 | 0 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 477,478 |
| 2028-29 | 0 | 96,583 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 477,478 |
| 2029-30 | 0 | 6,276 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 387,171 |
| 2030-31 | 0 | 6,276 | 134,340 | 145,267 | 162,000 | 51,300 | -20,489 | -91,523 | 387,171 |
|  | 422,560 | 1,654,463 | 2,552,460 | 2,760,073 | 3,078,000 | 974,700 | -389,291 | -1,738,937 | 9,314,028 |

impact of the merger.

As can be seen in Table 5.20, approximately $9,314,028 could be saved by the merged school district over the next nineteen years. From a financial perspective, this merger study is unusual in a variety of ways:

1. Small school districts considering merger are often times eligible for significant amounts of incentive operating aid. Because of the significant property wealth of both districts, a relatively small amount of incentive operating aid will be available to the merged district.

2. After a merger, existing capital debt is aided at the higher of the two district’s building aid ratio. While both districts have low building aid ratios, the Wells ratio is nearly three times the Lake Pleasant ratio. This has the effect of generating a significant amount of adjusted building aid on the existing debt in Lake Pleasant.

3. Small school districts are relatively expensive to operate. In merging the two small districts, savings due to scale economies are realized that are important to the overall financial picture of the district.

4. It is unusual that both school districts have provided breakfast and lunch to all students without charging for these meals. In the dire financial times that lie ahead, this practice must receive close scrutiny. The savings that are calculated in the previous table compared the expense that was actually transferred by both districts to their school lunch funds minus the federal food reimbursements received by both districts.

5. The staffing savings that are reflected in this table are fully discussed in the staffing chapter. However, it should be noted that the savings in teacher and administrative salaries and benefits and the costs to level up teacher salaries are all based on a grade level configuration that has a Pre-K-5 elementary school in Lake Pleasant, a Pre-K-5 elementary school in Wells, a 6-8 middle school in Lake Pleasant, and a 9-12 high school in Wells.

Finally, it is important to examine the impact that the savings noted in Table 5.20 would have on the tax rate in the two districts. To do so, we are using the 2010-11 fiscal year data for illustrative purposes knowing if a merger were to occur it would not take place until 2012-13. We are also assuming the noted savings in Table 5.19 were realized this current year.

In calculating the impact on the true tax rate, the following table 5.21 is developed to show relevant financial factors for the two districts.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 5.21**  **Tax Information for Wells and Lake Pleasant** | | | |
| Year/Factor | Wells | Lake Pleasant | Combined |
| 2010 Full Value | $387,042,629 | $456,305,357 | $843,347,986 |
| 2010-11 Tax Levy | $3,503,181 | $3,114,132 | $6,617,313 |
| 2011 True Tax Rate | $9.05 | $7.00 | $7.84 |
| Savings noted in Table 5.20 |  |  | $521,958 |
| Local Levy using savings |  |  | $6,095,355 |
| Tax rate after using 100% of savings |  |  | $7.23 |

The actual true tax rate for Wells this year is $9.05 per thousand dollars of full property value; in Lake Pleasant it is $7.00. In the event that all of the projected savings noted in Table 5.20 ($521,958) were used this current year to reduce taxes, it would result in a tax rate on true value of $7.23 per thousand of full-value in the merged district. This would mean a reduction in the tax rate on true value of $1.82 per thousand of full-value for current Wells residents, but an increase of $0.23 per thousand dollars of full-value for current Lake Pleasant taxpayers. This situation is created by the significant percentage spread in current tax rates between the two study districts.

**Chapter 6**

**Student Transportation**

*Wells Central School District*

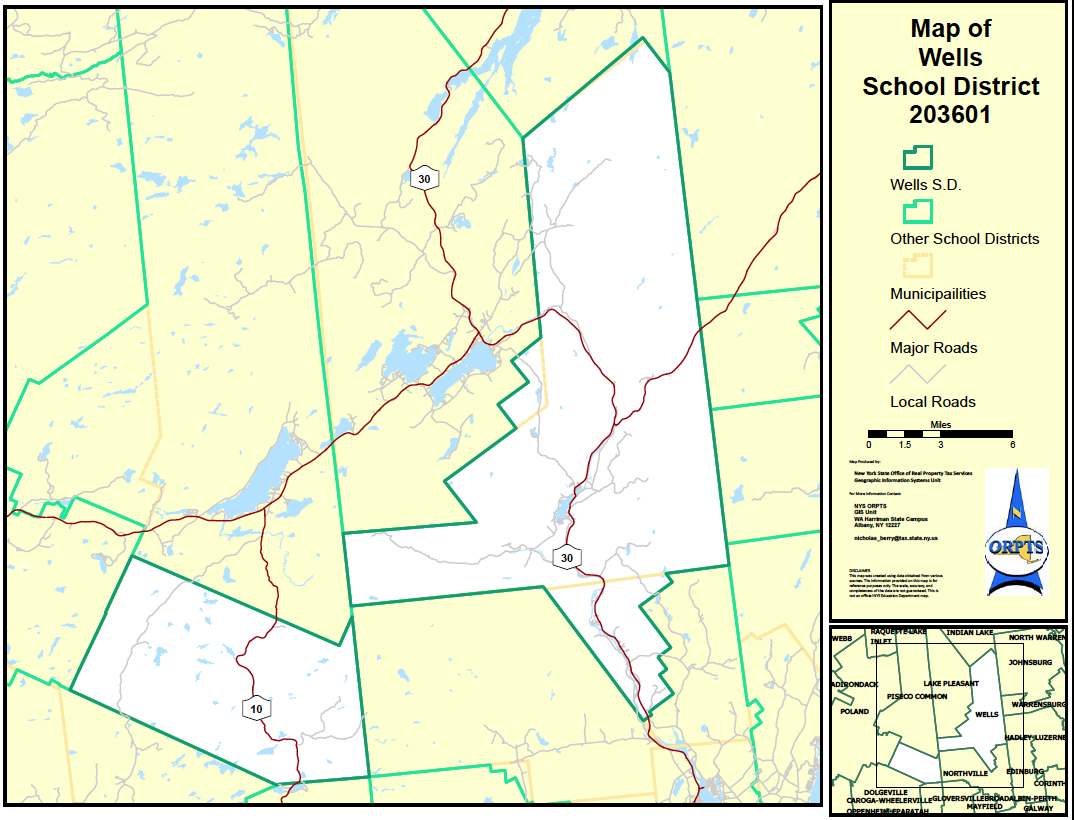
Wells conducts its own transportation program, however it contracts its vehicle maintenance with the Town of Wells (in 2010-11 the contract is for $56,004). The district has a transportation supervisor on a ten-month contract; she also drives a bus. The table below summarizes the current transportation fleet the district owns. The district has been on a bus replacement schedule that calls for the purchase of one large bus every ten years and small buses every 5-7 years. As the table illustrates, this permits the district to keep its fleet in good condition.

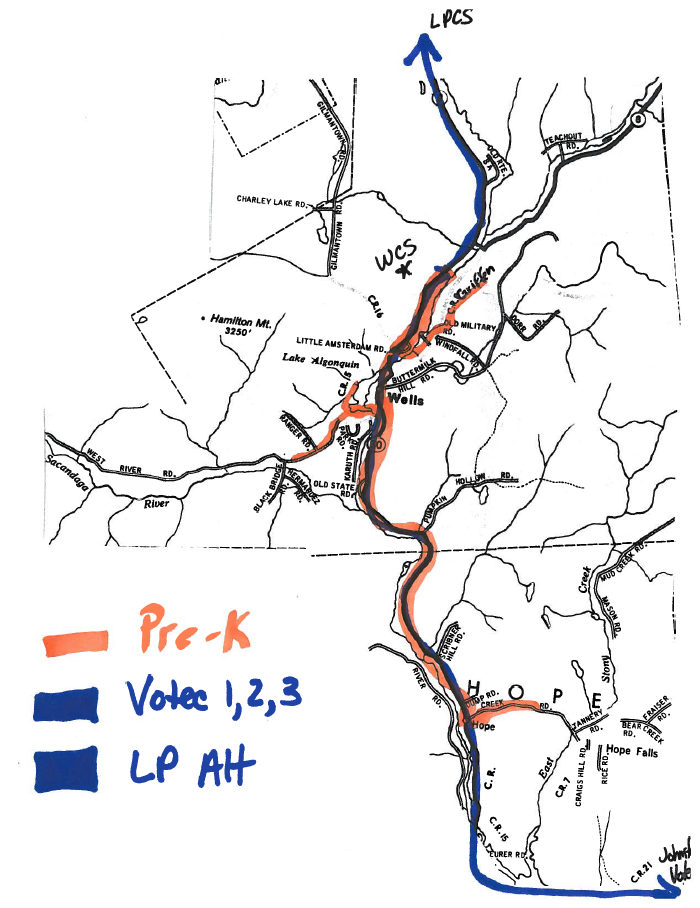
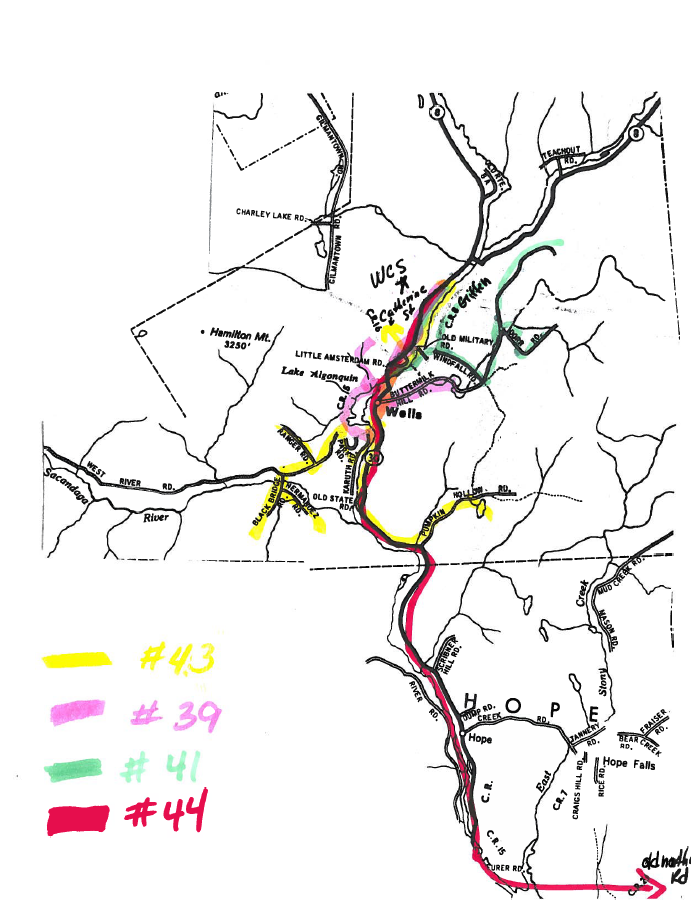
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| --- | --- | --- | --- | --- | --- |
| **Table 6.1**  **Summary of Transportation Fleet for Wells** | | | | | |
| Bus # | Year | Condition | Capacity | Model | Current Mileage |
| 37 | 2005 | Good | 8 | Ford | 108500 |
| 38 | 2005 | Fair | 18+1 w/c | Ford | 87500 |
| 39 | 2008 | Excellent | 54+1 w/c | IC | 22200 |
| 40 | 2006 | Excellent | 7 | Dodge | 61000 |
| 41 | 2009 | Excellent | 47 | IC | 25500 |
| 42 | 2008 | Excellent | 30 | Ford/Girardin | 34500 |
| 43 | 2009 | Excellent | 29 | Ford/Girardin | 17700 |
| 44 | 2012 | New | 65 | IC | 3000 |

All but one student in the district rides school buses to and from school daily. The district transports the other children on four (4) regular bus runs each day. The district also has a BOCES bus run each day and a PreK bus run daily. No student is currently on a bus longer than 30 minutes for any regular run. At the end of the day, Wells has two bus runs at 4:30 p.m. to transport students that stay late for athletics, extra help (AIS), clubs or detention. It should also be noted that Wells transports all students home after athletic events.

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| --- | --- | --- | --- | --- | --- | --- |
| **Table 6.2**  **Regular Bus Runs for Wells** | | | | | | |
| Bus # | A.M. Run Starts | A.M. Run  Ends | P.M. Run Starts | P. M. Run Ends | # of Passengers | Miles Covered |
| 39 | 7:00 | 7:40 | 3:05 | 3:40 | 52 | 9 |
| 41 | 6:45 | 7:40 | 3:05 | 3:45 | 27 | 14 |
| 43 | 6:45 | 7:40 | 3:05 | 3:45 | 17 | 24 |
| 44 | 6:45 | 7:40 | 3:05 | 3:55 | 48 | 26 |
| 38 |  |  | 1:00 | 3:05 | 7 | 79 (CTE 3) |
| 38 |  |  | 3:10 | 4:00 | 1 | 26 (LP Alt) |

Following is a map of the school district and the second map shows the current regular daily bus runs.

**



*Lake Pleasant Central School District*

Lake Pleasant also conducts its own transportation program. Unlike Wells, Lake Pleasant maintains its own fleet of buses and also provides maintenance by contract to buses from Piseco Central Schools. In the past, Lake Pleasant also used to service Wells’ bus fleet as well. Lake Pleasant has a transportation supervisor that also drives bus and is a mechanic. The following table summarizes the current fleet. Lake Pleasant replaces buses as needed.

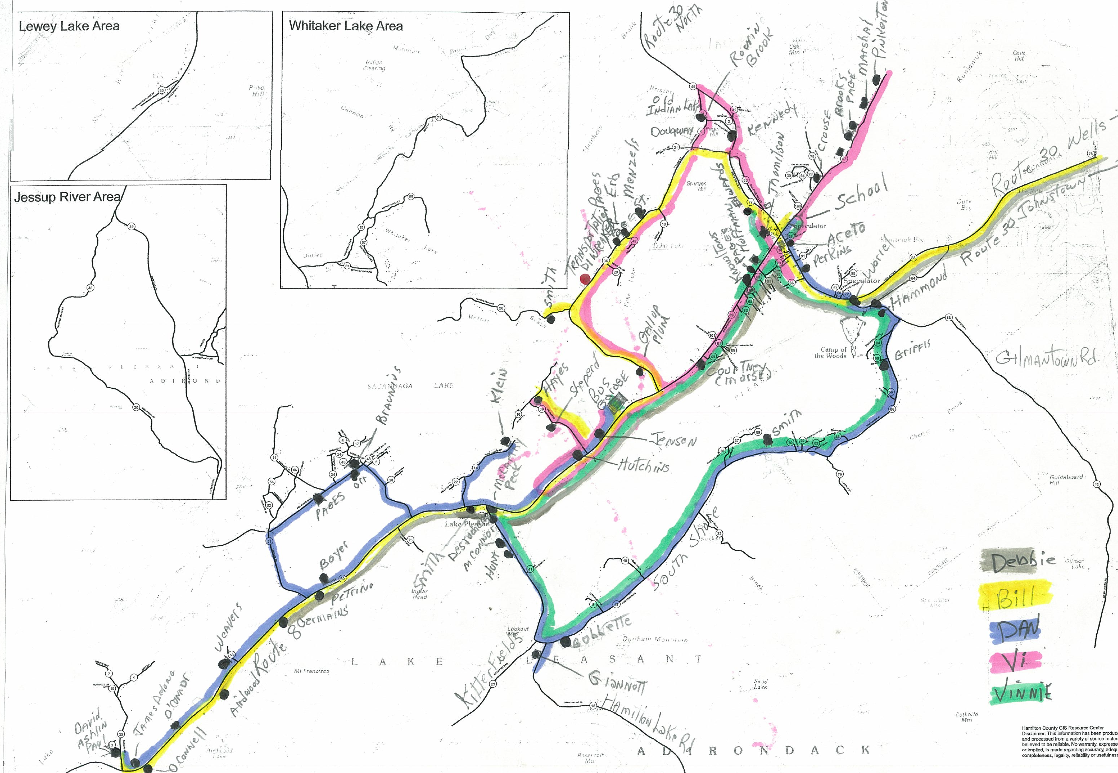
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| --- | --- | --- | --- | --- | --- |
| **Table 6.3**  **Summary of Transportation Fleet for Lake Pleasant** | | | | | |
| Bus # | Year | Condition | Capacity | Model | Current Mileage |
| 38 | 2002 | Fair | 47 | Freightliner | 60421 |
| 39 | 2002 | Good | 22 | GMC | 80627 |
| 40 | 2005 | Good | 48 | International | 48190 |
| 41 | 2005 | Good | 60 | International | 52584 |
| 42 | 2005 | Good | 7 | Suburban | 114659 |
| 43 | 2006 | Good | 28 | GMC | 47249 |
| 44 | 2007 | Good | 28 | GMC | 44256 |
| 45 | 2010 | Good | 48 | International | 40225 |
| 46 | 2010 | Good | 6 | Minivan | 6078 |

Lake Pleasant transports all students that choose to ride on three regular bus runs each day. The longest regular bus run is 40-45 minutes one way. The district also has one morning and afternoon bus run to Wells to take its grade 10-12 students and one morning and afternoon run to Johnstown for two high school students. Lake Pleasant also has a 4:20 p.m. bus run to take students home that choose to stay for Homework Club and the district also does an athletic run to Wells to bring Lake Pleasant students home after practice. Those students playing modified sports in the district are picked up by their parents. It should be noted that Piseco busses its secondary students to Lake Pleasant and they are then transported to Wells.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Table 6.4**  **Regular Bus Runs for Lake Pleasant** | | | | | | |
| Route # | A.M. Run Starts | A. M. Run Ends | P.M. Run Starts | P.M. Run Ends | # of Passengers | Miles Covered |
| 1 & 1A | 6:30 | 7:45 | 1:40 | 4:25 | 3 | 134 |
| 2 | 6:45 | 8:30 |  |  | 12 | 46 |
| 3 | 7:00 | 8:00 |  |  | 30 | 20 |
| 4 | 7:00 | 8:00 |  |  | 36 | 24 |
| 5 | 11:30 | 12:30 |  |  | 3 | 7 |
| 6 |  |  | 2:15 | 3:00 | 20 | 23 |
| 7 |  |  | 2:15 | 3:18 | 19 | 23 |
| 8 |  |  | 2:15 | 3:18 | 12 | 46 |
| 9 |  |  | 3:18 | 4:15 | 39 | 23 |
| 10 |  |  | 2:15 | 3:30 | 23 | 26 |
| 11 |  |  | 2:15 | 3:30 | 18 | 27 |
| 12 |  |  | 3:18 | 4:00 | 18 | 46 |
| 13 |  |  | 2:15 | 4:15 | 12 | 47 |

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.

The following is a map of the school district and also a map showing the current regular day bus runs to and from school.



**Chapter 7**

**Facilities**

The construction, maintenance, and enhancement of educational facilities are extremely important functions of school administrations. 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 program is 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 each of the two study districts is provided in one building. An overview of the Wells and Lake Pleasant Central School buildings is provided in the following table from a 2010 building conditions survey conducted by each district’s architectural firm. In reading the table that follows, these definitions are used for the overall rating of the buildings:

***E=Excellent****-All systems classified as health and safety or structural rated “excellent”, no systems rated below “satisfactory”, preventive maintenance plan in place.*

***S=Satisfactory****-All systems classified as health and safety or structural rated “satisfactory”, or better. No systems are rated “non-functioning” or “critical failure”.*

***U=Unsatisfactory****-Any system categorized as health and safety or structural rated “unsatisfactory”. No health and safety or structural system rated “non-functioning” or “critical failure”.*

***F=Failing****-Any system categorized as health and safety or structural rated “non-functioning” or “critical failure”. Building Certificate of Occupancy may be rescinded.*

|  |  |  |
| --- | --- | --- |
| **Table 7.1**  **Overview of Instructional Buildings** | | |
|  | Wells | Lake Pleasant |
| Address | 1571 State Route 30 | 120 Elm Lake Road |
| Year of Original Building | 1964/1988 | 2002 |
| Sq. Ft. in Current Building | 44,700 | 43,800 |
| Number of Floors | 1 | 1 |
| Grades Housed | PreK-12 | PreK-9 |
| Other Programs | Used by other organizations | Used by other organizations |
| Students Served in 2009 | 185 | 95 |
| No. of Instructional Classrooms | 19 | 23 |
| Sq. Feet of Instructional Classrooms | 15,553 | 15,750 |
| Rating of Space Adequacy (Good/Fair/Poor) | Good | Good |
| Estimated Capital Expense in the next five years | $367,500 | $353,000 |
| Overall Building Rating  (E/S/U/P) | Satisfactory | Excellent |
| Architect | Sacco & McKinney | Sacco & McKinney |

In addition to the instructional buildings the districts own, Lake Pleasant leases a bus storage/maintenance building from the Town of Lake Pleasant. This facility is located on Route 8 and was built in 1990. The building is 3,240 square feet in size and is used primarily for bus maintenance. The space adequacy is rated as “good” and the overall building rating is “satisfactory”. Estimated capital construction expenses through 2015-16 are $87,000.

The Building Condition Survey, required of all school districts in New York State every five years, also identifies current issues in the buildings and forecasts issues that may occur in these buildings. These two districts have very few areas noted as either “unsatisfactory”, “non-functioning”, or “critical failure”. The following tables summarize these areas for both districts.

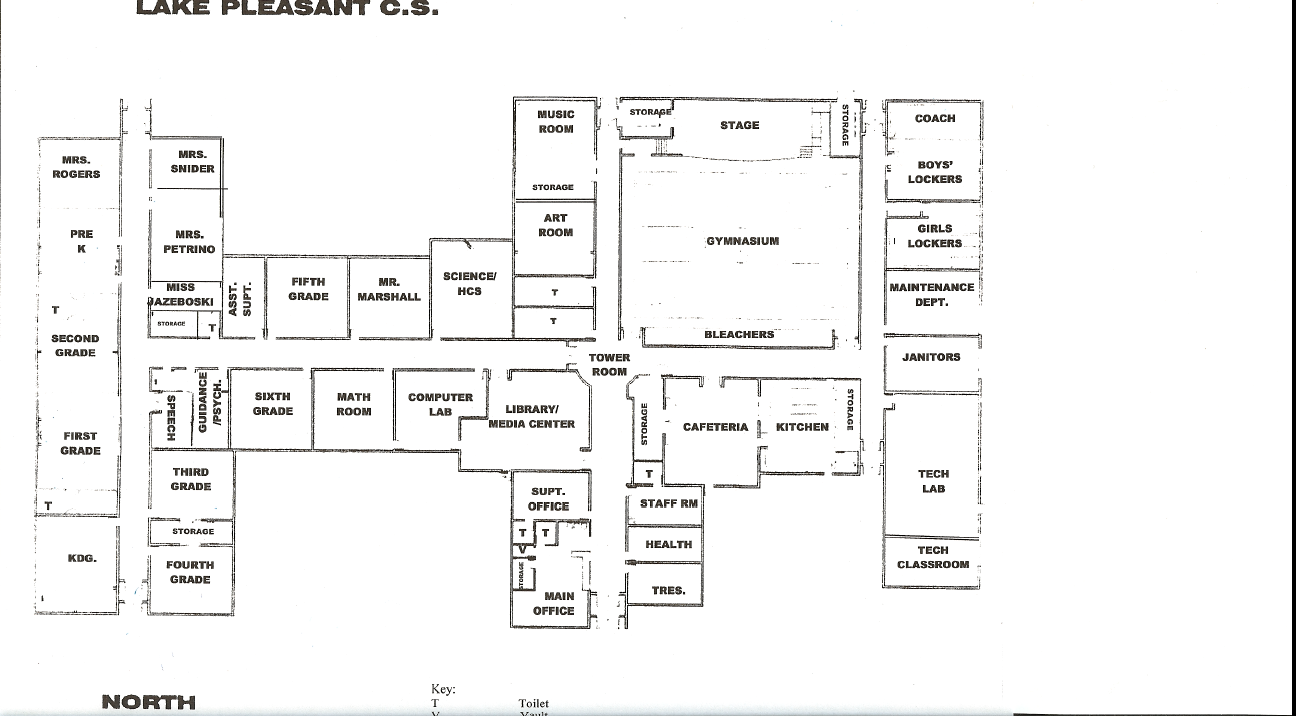
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| --- | --- | --- |
| **Table 7.2**  **Areas of Future Concern in Wells School Building** | | |
| ***Area*** | ***Cost to Reconstruct or Replace*** | ***Comments*** |
| Site Utilities-Water\* | $10,000 | Replace backflow prevention and building service system. |
| Interior Doors\* | $15,000 | Replace interior open wood slat frames. |
| Cooling/Air Conditioning Generating Systems | $50,000 | Provide A/C to custodial office, music office, and music practice rooms. A/C also provide ventilation. |
| Air Handling and Ventilation Equipment | $270,000 | Provide corridor ventilation; seal classroom transfer to corridor and provide classroom exhaust. |
| Emergency/Exit Lighting Systems | $22,500 | Several areas lack coverage, unclear what lighting is provided with generator power. No exterior egress lighting provided. |
| **School Building Total** | **$367,500** |  |
| \*NOTE: These two items were rated as “satisfactory” however the architect provided cost estimates for possible future improvements. | | |

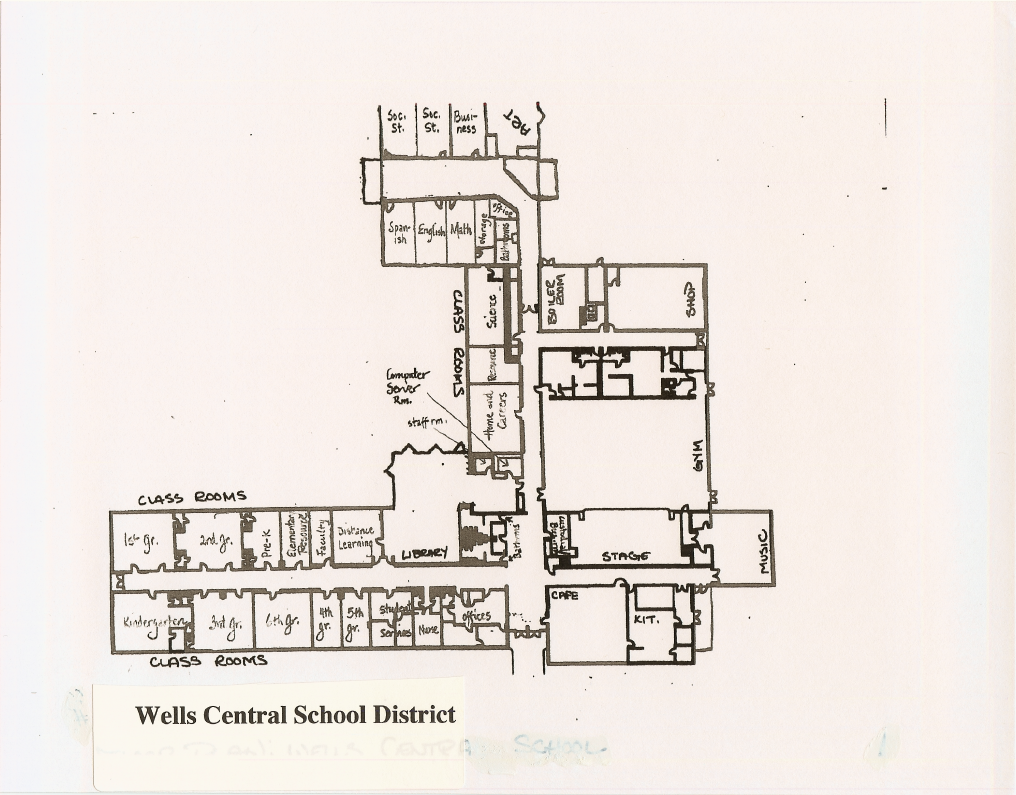
|  |  |  |
| --- | --- | --- |
| **Table 7.3**  **Areas of Future Concern in Lake Pleasant Facilities** | | |
| ***Area*** | ***Cost to Reconstruct or Replace*** | ***Comments*** |
| ***Lake Pleasant School Building*** | | |
| Air Handling & Ventilation Equipment | $350,000 | No economizer mode in classroom unit ventilations, corridors not ventilated, maintenance exhaust fan not functioning, etc. Although built to code in 2002. |
| HVAC Control Systems | $3,000 | Provide motor operation and controls for gym gravity vent dampers. Although built to code in 2002. |
| **School Building Total** | **$353,000** |  |
| ***Lake Pleasant Bus Storage/Maintenance Facility*** | | |
| Air handling and ventilation equipment | $60,000 | Provide ventilation system since there is currently no ventilation to this building. |
| Accessibility | $25,000 | None but noted no accessibility for people with disabilities. |
| **Bus Facility Total\*** | **$85,000** |  |
| **Grand Total** | **$438,000** |  |
| NOTE: Since Lake Pleasant leases the bus storage/maintenance facility from the Town, any capital work will be done by the Town and this is covered in the lease the district has executed. Also, some of the items noted by the district’s architect have since been corrected and have therefore been deleted from this list and there is currently some discussion with the State Education Department as to whether the air handling and ventilation equipment and HVAC control systems do in fact need correction. | | |

It should also be noted that both communities’ support for capital projects has been strong. In Wells, a 1997 capital project added a new wing in the high school which consisted of seven classrooms, two storage rooms, and two handicap accessible bathrooms. The project also included expansion and reconstruction of the media center, the addition of a distance learning room and reconfiguration and reconstruction of the main office, as well as replacement of the crumbling existing sidewalks. Wells voters also approved a capital project in 2004-05 that provided a new boiler, windows, asbestos abatement, new electrical components, and a new parking lot. The scope of the project was intended to save energy and upgrade the existing plant. Finally, in 2007-08 the Wells voters again approved a capital project that involved roof replacement. The roof over the gymnasium had been plagued with many leaks over the years and despite several attempts to patch it, it needed replacement. The project was partially funded by state EXCEL aid.

Neither district has any current capital projects in the planning.

The second major consideration with respect to facilities is exploring the available space and how it might be used should a merger occur. The following pages show the current floor plans of each district’s building.





Both districts use all available rooms in their schools. Although the elementary class sizes are small in both districts, so too are many of the rooms. For example, in Lake Pleasant elementary classrooms are 660 square feet, less than the typical 770 square feet rooms in most elementary schools. In Wells, several of the classrooms are divided into two rooms by fixed or movable partitions (specifically 4th and 5th grades, PreK and resource). Given the facility sizes and student enrollments, each district’s building can very comfortably accommodate the number of students currently being served.

It should also be noted that both districts allow outside groups to use the facilities. The table below summarizes the major organizations that use each districts schools.

**Wells Central School**

|  |  |
| --- | --- |
| **Table 7.4**  **Outside Groups Using District Buildings** | |
| **Wells** | **Lake Pleasant** |
| Town Basketball (Sundays)  Partners in Education  Wells Improvement Group-Family Night  Wells Library-music programs  Area churches-Sportsman Dinner  Woman’s softball league-fields summer  Deerfoot Lodge-evenings summer | Girl Scouts  Yoga Group  Zumba Group  Adult Volleyball  Indoor Soccer  TOPS Group  Mountain Arts Consortium  Pretty Good Band  Municipalities (meetings & presentations)  Town Library  Walkers (use halls 3:30-8:00 p.m.)  4th of July Parade Committee |

**Chapter 8**

**Staffing and Contracts**

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

In a school district merger by centralization, a new board of education is elected to serve the newly created school district. One of the functions of the new board of education will be to recognize newly configured bargaining units and an appropriate bargaining agent to represent the instructional and support staff in the district. The board and the unions would bargain new collective bargaining agreements which would set forth the terms and conditions of employment for the employees of the consolidated school district. The existing contracts would remain in place until a successor agreement is negotiated.

The teacher contracts from both districts have been analyzed. Both teacher contracts expire on June 30, 2011. Table 8.1 that follows is a comparison of the major provisions in the teacher contracts. 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 the successor agreement in the new school district could be accomplished without major difficulty. Table 8.1 comparing some of the major contract provisions follows.

|  |  |  |
| --- | --- | --- |
| **Table 8.1**  **Teacher Contract Comparison-2010-11** | | |
| Item | Lake Pleasant | Wells |
| Duration | 2008-2011 | 2010-2011 |
| Recognition | All full time teachers | All certified staff except the Superintendent and substitute teachers |
| Grievance Procedure | Last stage is a board of education hearing | Last stage is binding arbitration |
| Health Insurance | 85%-Individual  85%-Family  For employees hired after 7.1.10,  80%-Individual  80%-Family | 85%-Individual  85%-Family |
| Health Insurance Buyout | $750-Single  $1,000-2 Person  $1,700-Family | None |
| Dental Insurance | 85%-Individual  85%-Family  For employees hired after 7.1.10,  80%-Individual  80%-Family | Cost fully borne by the district up to $511 for individual coverage and $1,101 for family coverage; the cost of any claims above these limits are split 50%/50% between the teacher and the district |
| Vision Insurance | 85%-Individual  85%-2 Person  85%-Family  For employees hired after 7.1.10,  80%-Individual  80%-Family | None |
| Sick Leave | 13 days/year cumulative to 180 days | N/A-See Leave Time |
| Personal Leave | 3 days/year; unused days accumulate to sick leave | N/A-See Leave Time |
| Leave Time | N/A-See Sick Leave and Personal Leave | 17 days/year cumulative to 400 days. The year after the teacher accumulates 225 days, between 7 and 12 days can be sold back to the district at the rate of $30/day |
| Sabbatical | After 7 years of continuous service, a summer sabbatical may be granted at 15% of salary | After 7 years of service, district may grant a sabbatical for 1 year at half pay or one half year at full pay |

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 8.1 Continued**  **Teacher Contract Comparison-2010-11** | | | |
| Item | Lake Pleasant | | Wells |
| Teaching Load | No Language | Normal load for junior-senior high school teachers is not more than six 40 minute periods per day | |
| Staff Structure | No Language | Barring major changes in current conditions or other changes affecting the school, the board intends to maintain the present professional staff structure | |
| Just Cause | No Language | No tenured teacher shall be disciplined, reprimanded, reduced in rank or compensation, suspended, demoted, transferred, terminated, or deprived of any professional advantage without just cause | |
| Leave Buy Back | Sick leave may be sold back by staff who have more than 100 accumulated sick days; 10/year can be sold back at ½ the sub pay rate | For staff who discontinue service in good standing with at least 15 years of service, 1/200th of the teacher’s salary for 35% of the teacher’s accumulated sick leave up to a maximum of 400 days | |
| Retiree Health Insurance | For employee and spouse:  30 years of service-80%  20 years of service-70%  Less that 20 years of service:  Individual=54%  Employee=39% | For PPO-A,  75%-Individual  50%-Spouse  For any plan other than PPO-A,  75%-Individual  35%-Spouse | |
| Retiree Dental Insurance | For employee and spouse:  30 years of service-80%  20 years of service-70%  Less that 20 years of service:  Individual=54%  Employee=39% | None | |
| Retiree Vision Insurance | For employee and spouse:  30 years of service-80%  20 years of service-70%  Less that 20 years of service:  Individual=54%  Employee=39% | None | |

With respect to the comparison of salary schedules, an analysis was completed at various points on the schedules. Table 8.2 shows those comparisons for the 2010-11 school year.

|  |  |  |
| --- | --- | --- |
| **Table 8.2**  **Teacher Salary Schedule Comparisons (2010-11)** | | |
|  | Lake Pleasant | Wells |
| B-Step 1 | $37,549 | $41,758 |
| B-Step 5 | $43,009 | $45,084 |
| B-Step 10 | $49,834 | $50,728 |
| B-Step 15 | $56,659 | $57,364 |
| B-Step 20 | $63,484 | $64,028 |
| B-Top Step | $70,309 (25) | $73,384 (25) |
|  |  |  |
| M-Step 1 | $38,610 | $45,277 |
| M-Step 5 | $44,070 | $48,603 |
| M-Step 10 | $50,895 | $54,247 |
| M-Step 15 | $57,720 | $60,883 |
| M-Step 20 | $64,545 | $67,547 |
| M-Top Step | $71,370 (25) | $76,903 (25) |
|  |  |  |
| M+30-Step 1 | $39,360 | $47,827 |
| M+30-Step 5 | $44,820 | $51,153 |
| M+30-Step 10 | $51,645 | $56,797 |
| M+30-Step 15 | $58,470 | $63,433 |
| M+30-Step 20 | $65,295 | $70,097 |
| M+30-Top Step | $72,120 (25) | $79,453 (25) |

( ) = Number of years to reach the top step

As can be seen from the table above, the teacher salary schedule in Wells is higher at every step and in every column, Bachelors Degree, Masters Degree, and Masters plus 30 graduate hours. There is no state statute or regulation that determines the level at which the successor teacher agreement 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 schedules. However, in districts that have merged in New York State, there has traditionally been a “leveling up” process that takes place with regard to salary and benefits. That is, teachers in the lower paying of the merged districts have their salaries “leveled up” to the higher district salary schedule. 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 acknowledging this history of leveling up, it should also be noted that this leveling up of salaries and benefits has taken place when the economic conditions in schools were far more favorable than they are today.

Beyond the analysis of the teacher salary schedules, further analysis was performed by examining each teacher’s salary from both districts. In making this analysis, the assumption was made that teacher salaries would be “leveled up.” Because Wells has the higher salary schedule, this analysis assumes that the Lake Pleasant teachers would be leveled up to the Wells salary schedule. Analyzing the payrolls results in the following teacher salary comparison table.

|  |  |  |
| --- | --- | --- |
| **Table 8.3**  **Teacher Salary Comparisons-2010-11** | | |
|  | Lake Pleasant | Wells |
| # of FTE Teachers | 18 | 28.8 |
| Teacher Payroll | $1,009,143 | $1,770,593 |
| Average Teacher Salary | $56,064 | $61,479 |

The average teacher salary does not always indicate the richer salary schedule because the years of experience and degrees that the teachers possess may influence the average salary as much or more than the schedule itself. However, it is clear that the schedule in Wells is the higher of the two schedules.

In analyzing the cost of leveling up the Lake Pleasant teachers, the step and degree level was determined for each Lake Pleasant teacher. Using this information, each teacher was then placed on the Wells salary schedule according to that step and education level. In-service hours and longevity payments, minor adjustments in salaries, were not included in the analysis. The result was that moving the Lake Pleasant teaching staff to the Wells salary schedule would result in a payroll of $1,081,336. This is $77,562 higher than Lake Pleasant’s existing payroll of $1,003,774. In addition to the salary impact, we have estimated the increase in fringe benefits due to leveling up to be approximately 18%, using 8% for retirement, 8% for social security, and 2% for workers compensation. This adds another $13,961 for increased fringe benefit costs. The total cost of salaries and benefits for leveling up the Lake Pleasant teachers to the Wells salary schedule is $91,523.

Stipends for coaches were next examined. Lake Pleasant and Wells both have students who play on most of the JV and varsity teams in Wells. Both school districts offer modified sports for their students. The districts are both class D schools within Section VII and participate in the Mountain Valley Athletic Conference. Table 8.4 shows the stipends for the coaches of athletic teams.

|  |  |  |
| --- | --- | --- |
| **Table 8.4**  **Middle/High School Coaching Stipends-2010-11** | | |
| Sport | Lake Pleasant | Wells |
| Varsity Soccer |  | $2,538 |
| JV/Modified Soccer | $2,012 | $1,820 |
| Varsity Basketball |  | $3,876 |
| JV/Modified Basketball | $3,552 | $3,080 |
| Varsity Baseball |  | $2,538 |
| JV/Modified Baseball | $1,893 | $1,820 |
| Varsity Softball |  | $2,538 |
| JV/Modified Softball | $1,893 | $1,820 |
| Golf |  | $1,161 |
| Cheerleading |  | $1,542 |

Based on the stipends paid to coaches in Tables 8.4, are of little enough consequence that we believe that, should the districts merge, negotiating coaching stipends would not present a major obstacle.

In addition to interscholastic athletics, we also examined the other extra-curricular activities available to students of both districts and have developed Table 8.5 as follows to show the stipends paid to the club advisors in 2010-11:

|  |  |  |
| --- | --- | --- |
| **Table 8.5**  **Stipends for Extra-Curricula Activities-2010-11** | | |
| Activity | Lake Pleasant | Wells |
| Yearbook |  | $2,496 |
| Student Activity Treasurer | $806 | $1,884 |
| Class Advisor, Grades 7-12 | $637 (7); $637 (8); $806 (9) | $1,002 |
| Student Council |  | $508 |
| Honor Society |  | $508 |
| Approved Clubs |  | $508 |

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 some differences paid in the above table, we believe that, should a merger occur, negotiating equitable stipends for advisors of extra-curricular activities would not be terribly difficult to accomplish.

We now turn to the analysis of the administrators currently employed by both districts. Both of the superintendents have individual employment contracts with their districts. The Lake Pleasant superintendent’s contract expires on June 30, 2013. The superintendent in Wells is in an interim status. This interim superintendent contract commenced on July 19, 2010 and will extend until the starting date of a new superintendent.

When two school districts merge, the new board of education is obligated to honor the terms of the superintendent contracts that are in place at the time of the merger. Obviously, the merged district will have only one superintendent. This new superintendent may be one of the existing superintendents or it might be another individual. While there is no obligation for the new board of education to hire either of the currently sitting superintendents, often a new board will offer the position to one of the incumbents. In this case, the second superintendent often serves as the assistant superintendent upon the merger of the districts, finds a position in another district, or retires. However, regardless of who is chosen for the position and what changes in title may occur, the terms of each of the current superintendent’s contracts who are employed at the time of the merger must be honored for as long as the merged district employs the two individuals. It is anticipated that the current contract with the interim superintendent in Wells will expire should the districts decide to merge.

Currently, each district has a superintendent who also serves as the principal for his building. In the event that a merger were to occur, it is reasonable to assume that one of the superintendent positions would be eliminated and the equivalent of one principal position would be created. Again, since the superintendent in Wells is in an interim capacity, we assume that the position of superintendent would be eliminated in the Wells budget and a principal would be hired. In calculating the impact of this change, we know that Wells has budgeted $118,000 for the superintendent’s position. We also estimate that the average salary for a 1.0 FTE principal in this region would be approximately $80,000. As a result, this change in administrative positions would save the merged district $38,000 in salary. In addition, using an estimate of 35% for fringe benefits, another $13,300 could be saved for a total savings of $51,300 in salary and fringe benefits.

In projecting the savings due to administrative efficiencies, we considered administrative responsibilities as they currently exist. The State Education Department is in the process of implementing a new teacher evaluation system that could increase supervisory duties that could mitigate the saving described in the previous paragraph.

With respect to support staff, Lake Pleasant and Wells both have one recognized bargaining unit. The Lake Pleasant contract with the Non-Instructional Employees Association expires on June 30, 2011. The Wells contract with the Support Staff Association will also expire on June 30, 2011.

|  |  |  |
| --- | --- | --- |
| **Table 8.6**  **Support Staff Contract Comparison-2010-11** | | |
| Item | Lake Pleasant | Wells |
| Duration | 2008-2011 | 2010-2011 |
| Recognition | All non-instructional personnel | All permanent support staff who work at least 35 hours per week and bus drivers who work 3 hours or more/day on regularly scheduled run; excludes substitutes |
| Grievance Procedure | Final decision is with the board of education | Final decision is with the board of education |
| Health Insurance | 85%-Individual  85%-Family  Employees hired after 7.1.09,  80%-Individual  80%-Family | PPO-A:  Ind-Dist=$5000; Staff=$2296  2 Person-Dist=$10000; Staff=$4604  Family-Dist=$13500; Staff=$5880  PPO-B:  Ind-Dist=$5000; Staff=$208  2 Person-Dist=$10000; Staff=$44  Family-Dist=$13500; Staff=$0 |
| Health Insurance Buyout | Single-$750  2 Person-$1,000  Family-$1,700/year | $1,000 |
| Dental Insurance | District pays 85% of the following premiums:  Individual-$247  Family-$703 | District contribution:  $600-Individual  $1,200-Family |
| Vision Insurance | 85%-Individual  85%-2 Person  85%-Family |  |
| Retiree Health Insurance | For employee and spouse:  30 years of service-80%  20 years of service-70%  Less that 20 years of service:  Individual=54%  Employee=39% | PPO-A or PPO-B:  75%-Individual  50%-2 Person  Indemnity Plan:  75%-Individual  35%-2 Person |
| Sick Leave | 13-15 days/year, cumulative to 200 days | N/A-See Leave Time |
| Personal Leave | 3 days/year; unused days accumulate with sick leave | N/A-See Leave Time |
| Leave Time | N/A-See Sick Leave and Personal Leave | 17 days/year cumulative to 150 days. |
| Sick Leave Bank | Yes | Yes |

|  |  |  |
| --- | --- | --- |
| **Table 8.6 Continued**  **Support Staff Contract Comparison-2010-11** | | |
| Item | Lake Pleasant | Wells |
| Leave Buy Back | Sick leave may be sold back by staff who have more than 100 accumulated sick days; 10/year can be sold back at ½ the sub hourly pay rate times the number of hours worked per day | For staff who discontinue service in good standing with at least 15 years of service, 1/200th of the employee’s salary for 30% of the employee’s accumulated sick leave up to a maximum of 150 days |
| Holidays | 12 | 12 |
| Vacation | 2 week after 1 year  3 weeks after 10 years  4 weeks after 15 years | 2 weeks after 1 year  3 weeks after 7 years  4 weeks after 12 years |
| Retirement Stipend | None | $5,000-but only applied to staff who retired on or before 6.30.10 |
| Retiree Health Insurance | For employee and spouse:  30 years of service-80%  20 years of service-70%  Less that 20 years of service:  Individual=54%  Employee=39% | For PPO-A,  75%-Individual  50%-Family  For any plan other than PPO-A,  75%-Individual  35%-Family |
| Retiree Dental Insurance | For employee and spouse:  30 years of service-80%  20 years of service-70%  Less that 20 years of service:  Individual=54%  Employee=39% | None |
| Retiree Vision Insurance | For employee and spouse:  30 years of service-80%  20 years of service-70%  Less that 20 years of service:  Individual=54%  Employee=39% | None |
| Retirement Plan | A14/15 and 41-j | A 14/15 and 41-j |

Once again, we find that there are differences in the collective bargaining agreements with the two 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, a single collective bargaining agreement could be negotiated without major difficulties that would cover all support staff in the merged district.

We next attempted to compare salaries paid for support staff in Lake Pleasant and Wells. However, we found that the support staff titles did not exactly match in many cases in the two districts. To the extent that we could deem the positions comparable, table 8.7 that follows compares the support staff salaries for the study districts.

|  |  |  |
| --- | --- | --- |
| **Table 8.7**  **Support Staff Salaries-2010-11** | | |
| Title | Lake Pleasant | Wells |
| Bus Driver | $20.01 | $18.46 |
| Cook | $18.24 | $16.19 |
| Teacher Aide | $10.33 | $11.70 |
| Custodian/Cleaner II | $10.74-12.32 | $11.83 |
| Cafeteria Worker/Food Service Helper | $13.42 | $10.58 |

While it is clearly difficult to make exact comparisons between the salaries for support staff, it is clear that there are not huge discrepancies in the wages paid. In addition, unlike the teaching staff, there are not enough support staff employees to significantly impact the financial condition of the district should a merger occur. Whatever adjustments might be made in a merged district would be of much lesser impact than those adjustments that would be made in the teaching staff salaries or in positions that might be eliminated or combined as a result of the merger.

The next table (8.8) shows the complete staffing for the two districts. This table provides information that will also be valuable to the new board of education regarding the staffing level for the merged district. Again, the level of staffing is completely up to the board. Often, a board of education commits to maintaining all staff currently employed in both districts. When employees leave the district, however, the board may decide to fill or not to fill that position. In looking at the table, when the board feels the time to be appropriate, it would be reasonable to assume that some positions/responsibilities may be combined or eliminated in a merged district. On a cautionary note, however, unlike positions in a larger district that might be more specialized, staff in small school districts often carry multiple responsibilities within a single job title. Where an individual has multiple responsibilities, it might be more difficult to realize significant salary savings through the elimination of support positions.

|  |  |  |
| --- | --- | --- |
| **Table 8.8**  **Staffing for 2010-11** | | |
| Positions | Lake Pleasant | Wells |
| Attendance Clerk |  | 1 |
| Bus Driver | 4 | 5 |
| Cook | 1 |  |
| CSE/CPSE Chairperson | 1 |  |
| CSE Secretary | 1 |  |
| Custodian | 2 | 3 |
| District Clerk | 1 |  |
| Head Custodian | 1 |  |
| Cafeteria/Food Service Helper | 1 | 2 |
| Food Service Manager |  | 1 |
| Guidance Counselor |  | 1 |
| Mechanic | 1 |  |
| Nurse |  | 1 |
| Office Clerk | 1 |  |
| Office Aide | 1 |  |
| Psychologist | .6 | 1 |
| Senior Typist | 1 |  |
| Superintendent | 1 | 1 |
| Superintendent’s Secretary |  | 1 |
| Teacher | 18 | 28.8 |
| Teacher Aide |  | 1 |
| Teaching Assistant | 1 | 2 |
| Network/Technology Coordinator | 1 | .4 |
| Treasurer | 1 | .4 |
| Transportation Coordinator/Mechanic | 1 |  |
| **Total Staff** | **39.6** | **49.6** |

So while there may be some opportunities to reduce the number of positions in clerical and teaching positions, the degree to which positions are reduced and when these reductions might occur will be completely at the discretion of the new board of education.

In addition to the positions listed in the table above, both districts utilize BOCES staff on a part time basis in such areas as physical therapy, occupational therapy, dental hygiene, speech pathology, and others.

The major fringe benefit cost in Lake Pleasant and Wells is for health insurance. The tables that follows (8.9 and 8.10) compare the health insurance costs for the two districts.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 8.9**  **Health Insurance Premiums for Lake Pleasant-2010-11** | | | |
| Plan | Coverage | Yearly Premium | District Contribution |
| MVP Health Care  (Staff hired prior to 7.1.08) | Individual | $7,039 | $5,984 |
| 2 Person | $14,239 | $12,103 |
| Family | $18,886 | $16,053 |
| MVP Health Care  (Staff hired after 7.1.08) | Individual | $7,039 | $5,632 |
| 2 Person | $14,239 | $11,391 |
| Family | $18,886 | $15,109 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 8.10**  **Health Insurance Premiums for Wells-2010-11** | | | |
| Plan | Coverage | Yearly Premium | District Contribution |
| Indemnity-Instructional\* | Individual | $9,852 | $4,678 |
| PPO-A-Instructional | Individual | $7,296 | $4,678 |
| 2 Person | $14,604 | $9,336 |
| Family | $19,380 | $12,415 |
| PPO-B-Instructional | Individual | $5,208 | $4,678 |
| 2 Person | $10,044 | $9,356 |
| Family | $13,032 | $12,415 |
| PPO-A-Support Staff | Individual | $7,296 | $5,000 |
| 2 Person | $14,604 | $10,000 |
| Family | $19,380 | $13,500 |
| PPO-B-Support Staff | Individual | $5,208 | $5,000 |
| 2 Person | $10,044 | $10,000 |
| Family | $13,032 | $13,500 |

\* The Indemnity Plan will not be available after 12.31.11

Lake Pleasant carries its own health insurance program while Wells participates in the Fulton-Montgomery Health Insurance Consortium. Lake Pleasant offers its employees vision insurance that is not available to employees in Wells. There are clearly differences in the insurance coverage and contribution amounts. However, once again, we find great similarity in the way that health insurance coverage is administered in both districts and believe that, in a merged district, negotiating a plan and premium contribution rates could be accomplished without major difficulty.

In summary, we do not believe that there are differences in the employee salary and benefit provisions that are so significant that they would be a major barrier to merger, should the districts decide to go in that direction. Certainly many things will have to be negotiated and compromise will have to be reached. From a cost perspective, assuming retention of all current teaching and support staff, there are two factors that will have the greatest impact on the cost of merger. The first of these factors assumes a leveling up of teacher salaries and benefits for the Lake Pleasant teachers to the Wells salary schedule. This leveling up cost is estimated to be $91,523. This cost would be mitigated by the projected savings of $51,300, which could be realized by the replacement of a superintendent with one full time equivalent principal.

Finally, the greatest impact to the cost of staff salaries and fringe benefits will be impacted by the final grade level configuration that is decided upon for the merged district. From a financial standpoint only, the most cost effective structure would be to house the elementary school in one of the existing buildings and the house then junior-senior high school in the other one of the current facilities. This would allow for the reduction of seven elementary school teacher positions, one each in grades K-6.

Secondary enrollments including grades 7-12 are projected to be between 128 and 138 students for the six-year period, 2012-13 through 2017-18. In the core academic areas of English, Social Studies, Math, and Science, Lake Pleasant and Wells together currently have three teachers in each of those areas. If grades 7-12 were located in the same facility, a student load of approximately 135 students would not require three teachers in each academic area. Even with a large number of elective offerings that might be developed for the students, two core academic teachers in each area would be more than sufficient to serve 135 students. Once again, we see the potential for significant savings.

Given these observations about staffing efficiencies, however, conversations with members of the advisory committee, have made it extremely clear that both districts have very strong feelings about keeping elementary schools in their communities. This is not an unreasonable sentiment given the geography of the districts. As a result, our analysis on the impact of staffing in a merged district is based on the assumption that there would be a P-5 elementary school in Lake Pleasant and a P-5 elementary school in Wells. Furthermore, for purposes of estimating staffing savings, this study assumes that there would be a grades 6-8 middle school in Lake Pleasant and a grades 9-12 high school in Wells. This structure can be shown as follows:

|  |  |
| --- | --- |
| **Table 8.11**  **Recommended Grade Level Configuration-Merged District:2012-13** | |
| Lake Pleasant | Wells |
| P-5 elementary school | P-5 elementary school |
| 6-8 middle school |  |
|  | 9-12 high school |

We concur with the members of the advisory committee that elementary schools should continue to be located in each community. The distances that elementary school aged youngsters would travel on buses if a single elementary school was to be located in either community would simply be unreasonable for these children. We also feel strongly that children attending middle school are at a major transition point in their education as they move from self-contained elementary school classrooms to the departmentalized instruction of the secondary school. For this reason, we believe that a three-year transitional middle school would best serve the children. Since ninth grade is the point at which the vast majority of credits are earned by students for graduation, we believe that a high school with grades nine through twelve is most appropriate.

As a result, the sixth grades, which are currently self-contained classrooms in both districts, would become departmentalized as part of the middle school. The table which follows shows the secondary curriculum opportunities that would be available to middle and high school students in the merged district in the core academic areas of English, social studies, mathematics, science, and foreign language. The 24 students who are projected to be in sixth grade in 2012-13 are shown in this table as being served in the middle school.

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Table 8.12**  **Grade 6-12 Curriculum Offerings for 2010-11 and *2012-13*** | | | | | | | | | | | | |
| Course | | LP | | | Wells | # of Students | # of Sections |  | Merged District | # of Sections | Section Changes | Net Reduction in Sections |
| *ENGLISH* | | | | | | | | | | | | |
| *English 6* |  | | |  | |  |  |  | *12, 12* | *2* | *+2* | *3 fewer sections of English* |
| English 7 | 16 | | | 11 | | 27 | 2 |  | 14, 13 | 2 | 0 |
| English 8 | 9, 9 | | | 11 | | 29 | 3 |  | 15, 14 | 2 | -1 |
| English 9 | 11 | | | 1, 12 | | 24 | 3 |  | 12, 12 | 2 | -1 |
| English 10 |  | | | 6, 14 | | 20 | 2 |  | 20 | 1 | -1 |
| English 11 |  | | | 5, 7 | | 12 | 2 |  | 12 | 1 | -1 |
| English 12 |  | | | 1, 8 | | 9 | 2 |  | 9 | 1 | -1 |
| Greek Mythology |  | | | 6 | | 6 | 1 |  | 6 | 1 | 0 |
| Journalism |  | | | 4 | | 4 | 1 |  | 4 | 1 | 0 |
| College Prep Writing |  | | | 13 | | 13 | 1 |  | 13 | 1 | 0 |
| 20th Century Women’s Lit |  | | | 4 | | 4 | 1 |  | 4 | 1 | 0 |
| Science Fiction |  | | | 8 | | 8 | 1 |  | 8 | 1 | 0 |
| *SOCIAL STUDIES* | | | | | | | | | | | | |
| *Social Studies 6* |  | |  | | |  |  |  | *12, 12* | *2* | *+2* | *1 less section of social studies* |
| Social Studies 7 | 16 | | 11 | | | 27 | 2 |  | 14, 13 | 2 | 0 |
| Social Studies 8 | 9 | | 11 | | | 20 | 2 |  | 20 | 1 | -1 |
| Global History 9 | 11 | | 1, 12 | | | 24 | 3 |  | 12, 12 | 2 | -1 |
| Global History 10 |  | | 16, 1, 4 | | | 21 | 3 |  | 10, 11 | 2 | -1 |
| US History & Government |  | | 12 | | | 12 | 1 |  | 12 | 1 | 0 |
| Economics-1/2 yr |  | | 16, 8 | | | 24 | 2 |  | 12, 12 | 2 | 0 |
| Participation in Gov’t-1/2 yr |  | | 14, 10 | | | 24 | 2 |  | 12, 12 | 2 | 0 |
| Psychology |  | | 7 | | | 7 | 1 |  | 7 | 1 | 0 |
| Investments |  | | 1 | | | 1 | 1 |  | 1 | 1 | 0 |
| AP US History & Government |  | | 3 | | | 3 | 1 |  | 3 | 1 | 0 |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| **Table 8.12 Continued**  **Grade 6-12 Curriculum Offerings for 2010-11 and *2012-13*** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Course | | | | | | | LP | Wells | | | | # of Students | | | | # of Sections | | | | |  | | | | | Merged District | | | | # of Sections | | | Section Changes | | | | | | Net Reduction in Sections | | |
| *MATHEMATICS* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *Math 6* |  | | |  | | | | | | |  | | | |  | | | | |  | | | | | *12, 12* | | | | | | *2* | | | | | *+2* | | | | *5 fewer sections of math* |
| Math 7 | 16 | | | 10 | | | | | | | 26 | | | | 2 | | | | |  | | | | | 13, 13 | | | | | | 2 | | | | | 0 | | | |
| Math 8 | 5, 1 | | | 10 | | | | | | | 16 | | | | 3 | | | | |  | | | | | 8, 8 | | | | | | 2 | | | | | -1 | | | |
| Integrated Algebra | 9 | | | 11, 1 | | | | | | | 21 | | | | 3 | | | | |  | | | | | 11, 10 | | | | | | 2 | | | | | -1 | | | |
| Algebra |  | | | 7 | | | | | | | 7 | | | | 1 | | | | |  | | | | | 7 | | | | | | 1 | | | | | 0 | | | |
| Geometry | 5 | | | 5, 1, 13 | | | | | | | 24 | | | | 4 | | | | |  | | | | | 12, 12 | | | | | | 2 | | | | | -2 | | | |
| Algebra 2 & Trigonometry |  | | | 5, 1 (Audit) | | | | | | | 6 | | | | 2 | | | | |  | | | | | 6 | | | | | | 1 | | | | | -1 | | | |
| Computer Science | 5, 6 | | | 2 | | | | | | | 13 | | | | 3 | | | | |  | | | | | 13 | | | | | | 1 | | | | | -2 | | | |
| Pre Calculus |  | | | 4 | | | | | | | 4 | | | | 1 | | | | |  | | | | | 4 | | | | | | 1 | | | | | 0 | | | |
| Calculus |  | | | 4 | | | | | | | 4 | | | | 1 | | | | |  | | | | | 4 | | | | | | 1 | | | | | 0 | | | |
| Business Math |  | | | 2 | | | | | | | 2 | | | | 1 | | | | |  | | | | | 2 | | | | | | 1 | | | | | 0 | | | |
| Business Math II |  | | | 1 | | | | | | | 1 | | | | 1 | | | | |  | | | | | 1 | | | | | | 1 | | | | | 0 | | | |
| ***SCIENCE*** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *Science 6* | |  | | | |  | | |  | | | | |  | | | |  | | | | | *12, 12* | | | | | *2* | | | | | | *+2* | | | | | | *2 fewer sections of science* |
| Science 7 | | 16 | | | | 11 | | | 27 | | | | | 2 | | | |  | | | | | 13, 14 | | | | | 2 | | | | | | 0 | | | | | |
| Science 8 | | 9 | | | | 11 | | | 20 | | | | | 2 | | | |  | | | | | 20 | | | | | 1 | | | | | | -1 | | | | | |
| Math & Science | |  | | | | 1 | | | 1 | | | | | 1 | | | |  | | | | | 1 | | | | | 1 | | | | | | 0 | | | | | |
| Earth Science | | 11 | | | | 11 | | | 22 | | | | | 2 | | | |  | | | | | 11, 11 | | | | | 2 | | | | | | 0 | | | | | |
| Earth Science Lab | | 11 | | | | 11 | | | 22 | | | | | 2 | | | |  | | | | | 11, 11 | | | | | 2 | | | | | | 0 | | | | | |
| Living Environment | |  | | | | 15, 4 | | | 19 | | | | | 2 | | | |  | | | | | 19 | | | | | 1 | | | | | | -1 | | | | | |
| Living Environment Lab | |  | | | | 5, 7, 7 | | | 19 | | | | | 3 | | | |  | | | | | 19 | | | | | 1 | | | | | | -2 | | | | | |
| Chemistry | |  | | | | 4 | | | 4 | | | | | 1 | | | |  | | | | | 4 | | | | | 1 | | | | | | 0 | | | | | |
| Chemistry Lab | |  | | | | 4 | | | 4 | | | | | 1 | | | |  | | | | | 4 | | | | | 1 | | | | | | 0 | | | | | |
| Physics | |  | | | | 2 | | | 2 | | | | | 1 | | | |  | | | | | 2 | | | | | 1 | | | | | | 0 | | | | | |
| Physics Lab | |  | | | | 2 | | | 2 | | | | | 1 | | | |  | | | | | 2 | | | | | 1 | | | | | | 0 | | | | | |
| General Physics | |  | | | | 7 | | | 7 | | | | | 1 | | | |  | | | | | 7 | | | | | 1 | | | | | | 0 | | | | | |
| Nanotechnology | |  | | | | 4 | | | 4 | | | | | 1 | | | |  | | | | | 4 | | | | | 1 | | | | | | 0 | | | | | |
| **Table 8.12 Continued**  **Grade 6-12 Curriculum Offerings for 2010-11 and *2012-13*** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Course | | LP | | | Wells | | | | | # of Students | | | # of Sections | | | | | |  | | | | | Merged District | | | # of Sections | | | | | Section Changes | | | | | Net Reduction in Sections | | | | |
| ***SCIENCE continued*** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Forensic Science | |  | | | | 4 | | | 4 | | | | | 1 | | | |  | | | | | 4 | | | | | 1 | | | | | | 0 | | | |  | | |
| Astronomy | |  | | | | 1 | | | 1 | | | | | 1 | | | |  | | | | | 1 | | | | | 1 | | | | | | 0 | | | |  | | |
| *SPANISH* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Spanish-7th | | |  | | | 10 | | | | 10 | | | 1 | | | |  | | | | | 10 | | | | | | | 1 | | | | | | 0 | | | *4 fewer sections of Spanish* | | | |
| Spanish-8th | | | 8 | | | 1, 9 | | | | 18 | | | 3 | | | |  | | | | | 18 | | | | | | | 1 | | | | | | -2 | | |
| Spanish 1 | | | 9 | | | 7 | | | | 16 | | | 2 | | | |  | | | | | 16 | | | | | | | 1 | | | | | | -1 | | |
| Spanish 2 | | | 1 | | | 5 | | | | 6 | | | 2 | | | |  | | | | | 6 | | | | | | | 1 | | | | | | -1 | | |
| Spanish 3 | | |  | | | 7 | | | | 7 | | | 1 | | | |  | | | | | 7 | | | | | | | 1 | | | | | | 0 | | |
| Spanish 4 | | |  | | | 2 | | | | 2 | | | 1 | | | |  | | | | | 2 | | | | | | | 1 | | | | | | 0 | | |
| Cultural Spanish | | |  | | | 1 | | | | 1 | | | 1 | | | |  | | | | | 1 | | | | | | | 1 | | | | | | 0 | | |
| Spanish Mentor | | |  | | | 1 | | | | 1 | | | 1 | | | |  | | | | | 1 | | | | | | | 1 | | | | | | 0 | | |

This table represents middle and high school staffing in the merged Lake Pleasant and Wells school district. This representation of sections and section sizes assumes that no class size is larger than 20 for any section. It is further assumed that the current staffing arrangement for the elementary schools of one teacher per grade level in each of the two elementary schools will remain unchanged for grades Pre-K through five. Since the sixth grade students would now be served in the middle school, and since there are extra sections of core academic time available, it is further assumed that two elementary school positions could be eliminated. This may be shown in the following table.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Table 8.13**  **Possible Effects on Staff in Merged District** | | | | |
| Grade/Subject | # of teacher reductions | # of fewer sections needed with no more than 20 students/class | # of classes with 5 or fewer students | *# of fewer sections with no more than 24 students/class* |
| 6th Grade | 2 | - | - | *-* |
| English | ? | 3 | 2 | *5* |
| Social Studies | ? | 1 | 2 | *4* |
| Math | ? | 5 | 4 | *8* |
| Science | ? | 2 | 8 | *5* |
| Spanish | ? | 4 | 3 | *4* |
| TOTAL | 2 + ? | 15 | 19 | *26* |

In calculating the financial impact of the above scenario, it is assumed that only two elementary school positions would be eliminated, those representing the two current sixth grades. There is no allowance for any economies that might be available as a result of the reductions in the number of core academic sections at grades 7-12. However, it would be reasonable to assume that with the development of a master schedule under this model, additional economies might be found. This table shows that 15 extra sections of core academic time would be available, even after programming for the sixth graders in the middle school. As shown in the table, should class sizes be permitted to increase to 24 students, 26 sections of core academic time would be available, perhaps even allowing for further savings. Finally, it should be noted that the same breadth of core academic programming would be available to students that exists today. Nineteen sections of classes with student enrollments of five or fewer would still remain. In the future, even more savings could be realized by offering classes that had minimum enrollment requirements.

It is estimated that the cost of a teacher is approximately $81,000, considering a salary of $60,000 and fringe benefit costs of 35%. As a result, it is estimated that the reduction of two elementary school teaching positions as described above would save the merged school district approximately $162,000.

In any community, the loss of jobs can have a devastating impact. In a small community, that impact can be even greater given the social and economic relationships that exist. In offering opportunities for staff reductions, it is understood that these changes may not all be implemented immediately. It would certainly be possible to phase in some of these reductions through attrition when teachers leave the area or retire. Should the merged district decide to eliminate jobs through attrition, a fairly common practice, the savings noted in this study would be delayed until the staff reductions were made. The district will have to balance the savings realized with the personal and community impact of the job losses.

Small school districts are, by their very nature, expensive to operate. From a staffing perspective, certain positions must be part of a school district’s operation no matter how many students attend that school. The central question that will have to be addressed in this study is one of balance. How do the school districts maintain reasonable costs while maintaining those things that are treasured most in small rural schools; small class sizes, personal attention for the students, elementary schools located where the younger children do not have long bus rides, many electives in the secondary school. As this study came together, this is the balance that we have attempted to achieve.

**Key Findings and Recommendations**

It is not within our province or the purpose of this study to recommend whether Lake Pleasant and Wells 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 to centralize the districts into a new single school system. It should also be understood by the reader that none of our recommendations are binding on a board of education if a merger occurs, but rather offer a starting point for discussion and policymaking.

Finding 1: Both Wells and Lake Pleasant school districts have experienced either growing or stable enrollments over the past six years. Looking to the future, a merged district should see some enrollment growth from 260 to approximately 281 students in 2017-18.

Finding 2: It is unlikely that either home-schooled students or those in private schools from the two districts will enter the public schools. Even if they did, it would not have any measurable impact on the district.

*Recommendation 1: A merged district should annually update enrollment projections to accurately monitor the impact of increasing or decreasing student base.*

Finding 3: Lake Pleasant has a grade pattern of PreK-6 and 7-9; Wells has a grade pattern of PreK-6 and 7-12. The Lake Pleasant students in grades 10-12 already attend Wells for high school.

Finding 4: At the elementary level, the teacher and student days are very similar in terms of beginning times. However, Lake Pleasant students in grades K-4 have a shorter day than Wells K-4 students, but Lake Pleasant students in grades 5-9 have a longer day.

Finding 5: Both districts have only one section per grade level (PK-6) and each section has a small number of students when compared to statewide averages.

Finding 6: There are significant curricular differences at the elementary level.

*Recommendation 2: If the districts merge, 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 PK-6.*

Finding 7: The amount of special area (art, music and physical education) time that elementary students receive per week, and the manner in which it is delivered (by a special area teacher or the classroom teacher), varies within and across the two districts.

*Recommendation 3: Following a merger, the elementary curriculum committee (mentioned in Recommendation 2) should also address a master schedule that ensures a consistent amount of time and delivery approach for all special area subjects in grades PK-6.*

Finding 8: In examining grades 3-6 student performance on the New York State ELA and math tests from 2005-06 to 2008-09 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 cause wide percentage swings from year to year.

*Recommendation 4: Following a merger, close review should be conducted for at least three years to ensure that there is no difference in elementary student achievement regardless of the previous district students attended (disaggregate the data by previous district attended).*

Finding 9: Considering the high school program, it should be noted that with the exception of ninth grade, all students in both districts have equal access to courses since they attend the same school.

Finding 10: High school course offerings show a solid academic program for students from both Wells and Lake Pleasant. However, there are many sections of classes with few students.

*Recommendation 5: In a merged district, the new Board of Education should monitor class sizes at all grade levels in order to ensure a balance between the greatest number of opportunities for students* *with the ability of the district to fund such opportunities.*

Finding 11: In examining student performance on the New York State ELA and math assessments for students in grades 7 and 8, little significant difference was found during the timeframe of 2005-06 and 2008-09. Again, given the small cohorts of students in each district, large changes from year to year can be caused by a few students.

Finding 12: A three-year (2007-08 to 2009-10) review of Regents examination results was presented. Given the fact the students from both districts attend the same high school for grades 10-12 the data provide little insight into the comparative performance of students from Lake Pleasant and Wells.

*Recommendation 6: Close review should be conducted for at least three years after merger to ensure that there is no difference in secondary student achievement regardless of the elementary school students attended.*

Finding 13: Secondary students in both districts have a solid array of interscholastic and extra-curricular activities to choose from, especially given the size of the districts.

Finding 14: Modified sports are now offered to Lake Pleasant middle school students.

*Recommendation 7: After merger, modified sports should continue to be offered to middle school students.*

Finding 15: The percentage of special education students varies considerably between the districts (Wells is nearly double Lake Pleasant).

*Recommendation 8: Once merged, a new Committee on Special Education and Pre-School Committee on Special Education should be appointed. These new committees should contain roughly equal representation from each of the previous district’s committees.*

Finding 16: Both districts have had consistent support of their respective communities for budget proposals presented. This is an indicator of a community’s support for its schools.

Finding 17: Lake Pleasant and Wells boards of education have been able to keep their districts in satisfactory financial condition as seen by their most recent balance sheets and history of fund balance growth.

Finding 18: The districts both purchase services from the HFM BOCES annually.

Finding 19: Lake Pleasant has historically spent considerably more per student. To some degree this is a function of being the smaller district.

Finding 20: Wells receives quite a bit more state aid each year than Lake Pleasant. This too is somewhat a function of enrollment size difference.

Finding 21: The amount of state aid per student each district receives is quite similar.

Finding 22: The property value and property tax levy per enrolled student is considerably higher in Lake Pleasant than Wells.

Finding 23: The Wells tax rate is quite a bit higher than the tax rate in Lake Pleasant. This is primarily a function of the difference in property wealth per student with Lake Pleasant having greater property wealth.

Finding 24: Lake Pleasant and Wells both have outstanding capital debt (Lake Pleasant, $5,358,876; Wells, $1,742,141). Lake Pleasant debt will be paid off in 2031 and Wells’ debt will be retired in 2022.

Finding 25: A merged district would get very little incentive operating aid over the next 14 years (total $422,560) due to the high property wealth of the districts. Hence, unlike many small, rural districts, the merger incentive aid is not a major factor in determining if merger is desirable as it would not lower the local tax rate.

Finding 26: A merged Wells-Lake Pleasant school district would realize considerable savings due to efficiencies created in the combined budget and additional building aid on existing debt.

Finding 27: The new district would see a reduction in transportation aid due to Wells’ transportation aid ratio (currently 12.4%) being reduced to that of Lake Pleasant’s transportation aid ratio (6.5%).

Finding 28: After the merger, state aid on capital debt—principal and interest payments—would increase for existing debt that Lake Pleasant currently owes. The higher of the two previous districts’ building aid ratio (that of Wells’) would be the new district’s aid ratio.

Finding 29: If all the projected savings and additional revenue a merged district realized was applied to reduce taxes, it would result in a tax reduction for current Wells residents but a tax increase for taxpayers in the Lake Pleasant district.

*Recommendation 9: The newly merged district Board of Education should closely scrutinize its first budget to ensure that the projected efficiencies are actually achieved following the merger, thus ensuring some local tax relief.*

Finding 30: Both districts operate their own transportation program. Wells has its bus maintenance done by contract with the Town. Lake Pleasant does its own bus maintenance along with that of Piseco.

Finding 31: The bus fleets of each study district are in good shape and are replaced at appropriate times.

Finding 32: Regular day bus runs in each district are quite simple. Lake Pleasant transports its students in grade 10-12 to and from Wells each day.

Finding 33: The longest run in each district is no more than 40 minutes. (out-of-district runs may be longer).

Finding 34: All students in each district are eligible to ride the school bus to and from school daily.

*Recommendation 10: Following a merger, a transportation study should be conducted to determine if the district should maintain its own buses, contract out the maintenance, or do some combination.*

*Recommendation 11: The transportation study recommended above should also include examination of the best routing pattern to ensure that no student is on the bus during a regular day run any longer than 45-50 minutes one way.*

Finding 35: Both school districts have done a good job of maintaining their school facilities, yet each has some future work that will need to be completed.

Finding 36: The Lake Pleasant and Wells facilities offer adequate space to house existing programs and the districts have been creative in their use of space.

Finding 37: Non-school groups use the facilities in each of the study districts.

*Recommendation 12: Following merger, the Board of Education should develop a building use policy for non-school affiliated organizations that will continue the current practices in both districts.*

Finding 38: Examining the teacher contract provisions for both districts, some differences exist. However, after a merger, negotiation of a new contract will not be create major difficulties due to these differences.

Finding 39: The teacher salary scale is higher at all points in Wells and, although not required, after a merger it is likely that the Lake Pleasant teachers’ salaries may be leveled-up to those in Wells at a cost this year of approximately $91,523 for salaries and related benefits.

Finding 40: The coaching salaries and stipends for extra-curricular activities that currently exist in Wells will not be difficult to renegotiate in a new contract.

Finding 41: Although each district offers different health insurance plans for their employees, the differences in contribution rates and coverage should not inhibit the ability to negotiate a common plan for the merged district.

*Recommendation 13: As soon as possible following a merger, the teachers should organize into a formal bargaining unit and negotiate a new contract with the district.*

Finding 42: Each district currently has a superintendent of schools/principal, however the individual in Wells is serving on an interim basis. A new district board of education can hire one or neither of the current superintendents to serve the merged district.

*Recommendation 14: A newly merged district should have a superintendent/principal in one building and a principal overseeing the other school. This would save the district approximately $51,300 in salary and benefits in today’s dollars.*

Finding 43: Wells has more support staff than Lake Pleasant due to its larger size.

Finding 44: Both districts have support staff represented by formal bargaining units.

Finding 45: There are not large discrepancies in the wages paid to support staff in the two current districts.

Finding 46: The support staff union contracts have some differences in provisions, however the differences are not significant enough to make negotiating a new contract exceptionally difficult.

*Recommendation 15: As soon as possible following a merger, the support staff should organize into a formal bargaining unit and negotiate a new contract with the district.*

Finding 47: The current staffing pattern in Wells is K-6, 7-12 and in Lake Pleasant it is K-9 with teachers at Wells teaching Lake Pleasant students in grades 10-12.

*Recommendation 16: Immediately after a merger, the staff, students and grades should be arranged so that each elementary school will house students in grades PK-5, grades 6-8 will be housed at Lake Pleasant, and grades 9-12 will be housed in the Wells building. This staffing plan will result in a reduction of at least two teaching positions for an estimated savings in salary and benefits of $162,000.*

Appendix

Appendix A

Merger Study Advisory Committee Meeting Notes

**MEMORANDUM**

TO: Lake Pleasant/Wells Merger Study Advisory Committee

FROM: Alan Pole and Bill Silky

RE: Meeting Notes-Meeting of February 7, 2011

DATE: February 9, 2011

Present: Committee Members-Julie Atty, Sheri Babcock, John Collado, Jean Frederick, Sheila Jazeboski, Sharon Parslow, Ed Pruden, Barbara Schoonmaker, Stephanie Smith, Katie Smith, Yvonne Snider, Sandy Stuart, Jon Swift, Jessica Robinson, Kirsten Tarnowski, Nancy Venier, Cynthia Viacava

Consultants: Alan Pole and Bill Silky

Superintendent Advisors: Ernie Virgil and John Zeis

Observers: Chris Hayes, Robert Hoffman, Beverly Hoffman, Ken Hoffman, Heather Philo, Dee Parker, Barbara VanSlyke, Grace Morrison, Roy Grisenthwaite, Sharon Grisenthwaite

Location: Wells Central School Cafeteria

1. Introductions were made of the consultants and the committee members. The directory of information about the committee members was reviewed and updated. The revised directory will be distributed at the next meeting.

2. Even though Alan Pole was supposed to do this item (), Bill Silky provided an overview of the motivation for school districts to engage in a merger study and discussed the role of the advisory committee and the role of the consultants in completing the study.

3. Meetings of the District Advisory Committee will be held from 6:30-8:30 pm as follows:

|  |  |  |
| --- | --- | --- |
| **Date** | **Topic** | **Location** |
| February 7 | Organization, Overview, and Enrollment Projections | Wells |
| February 14 | Instructional/Extracurricular Program | Lake Pleasant |
| March 2 | Finance | Wells |
| March 14 | Transportation | Lake Pleasant |
| March 30 | Facilities | Wells |
| May 2 | Staffing and Contracts | Lake Pleasant |
| May 9 | Review Findings and Recommendations/React to Draft Final Report | Wells |

4. Tours of the school buildings will be held beginning at 6:00 pm prior to the Advisory Committee meetings on the following dates:

March 2- Wells

March 14-Lake Pleasant

5. Meeting notes will be provided after each meeting. The notes will be emailed to all committee members and copied to the two superintendents. It will be the responsibility of the superintendents to distribute the notes within their districts as they deem appropriate. It is anticipated that, at a minimum, notes will be provided to board members and posted on each district’s web site. Meeting notes will also be emailed to the District Superintendent and the State Education Department.

6. Copies of agendas and all handouts will be provided to all committee members by the host district at each meeting.

7. All meetings of the advisory committee will be open. Members of the public will be welcome at these meetings. At the conclusion of each meeting, the observers will have the opportunity to offer comments or ask questions.

8. Alan Pole presented a PowerPoint overview of the school district merger process in New York State.

9. Bill Silky presented an overview of past enrollments for Lake Pleasant and Wells as well as projected future enrollments for both districts. In addition, he projected the enrollment of the potentially merged district. Over the next seven years, enrollments are projected to increase by 10.8% and grow from 260 to 288 students.

10. The next meeting will be held on Monday, February 14, 2011 in Lake Pleasant. The meeting will begin at 6:30 pm.

We believe this covers the essence of the discussions at our meeting on February 7. If you have questions with these notes, please feel free to contact me. We will also review these notes as the first agenda item at our next meeting.

Looking forward to seeing you again-2.10.11 in Lake Pleasant-6:30 pm!

C: Ernie Virgil

John Zeis

Pat Michel

Suzanne Spear

Jay O’Connor

**ßMEMORANDUM**

TO: Lake Pleasant/Wells Merger Study Advisory Committee

FROM: Alan Pole and Bill Silky

RE: Meeting Notes-Meeting of February 14, 2011

DATE: February 19, 2011

Present: Committee Members-Julie Atty, Sheri Babcock, John Collado,

Joy Eliezer, Jean Frederick, Sheila Jazeboski, Cristen Jones, Dickie

Mayers, Sharon Parslow, Ed Pruden, Barbara Schoonmaker, Katie

Smith, Stephanie Smith, Yvonne Snider, Sandy Stuart, Jon Swift, Nancy

Venier, Cynthia Viacava

Consultants: Alan Pole and Bill Silky

Superintendent Advisors: Ernie Virgil and John Zeis

Observers: Chris Hayes, Robert Hoffman, Beverly Hoffman, Dee Parker,

Barbara VanSlyke, David Bobbette, and Pamela Pooler

Location: Lake Pleasant Central School

1. An opportunity was provided to comment or ask questions about the

notes from the committee meeting of February 7.

2. The roster of the advisory committee members was reviewed and found

to be correct.

3. Bill Silky discussed the research article that was provided to the group

entitled “After Merger: What Really Happens?”

4. Bill Silky and Alan Pole reviewed the student program for both

districts including the academic and extra-curricular program.

Highlights of that presentation include the following:

a. Elementary class sizes for 2010-11 are small with the following

average section size existing for both districts: Pre-K=8; K=8; 1=9.5;

2=10; 3=10; 4=11.5; 5=7.5; 6=10;

b. If a merger were to occur, curriculum work would have to be

done to bring the two elementary programs more into alignment with

respect to the core academic areas as well as the special subject areas;

c. Student performance on the grade 3-8 assessments has been

fairly comparable over the past four years although exact comparisons

are difficult to make because of the small number of students tested;

d. In many ways the two high schools are already merged since

Lake Pleasant sends its students in grades 10-12 to Wells for high

school;

e. Course offerings in grades 7-12 are sufficient in the core

academic areas and have small class sizes. Electives are available to

students and have very small class sizes;

f. Student performance on Regents examinations is comparable to

other school districts. The number of students scoring above 85% on

social studies Regents seems quite high compared to other school

districts;

g. Many interscholastic athletic teams are already shared between

the districts with each district maintaining some of its own teams,

especially at the modified level;

h. A number of clubs and extra-curricular activities are available to

the students, which could be expected to continue if a merger were to

occur.

5. The committee spent time discussing the pros and cons of combining

the two elementary schools so that one section at each grade level could

be offered instead of the two sections that are currently in place.Other

than simply keeping the two existing elementary schools open or

combining the elementary grades into a single school, a third option was

proposed for consideration—keeping the PreK-3 students in each of the

existing elementary schools (close to home) and having the grades 4-6

students all together in one location.

6. The next meeting will be held on Wednesday, March 2, 2011 in Wells.

A tour of the Wells building will begin at 6:00 pm. The business meeting

will begin at 6:30 pm.

We believe this covers the essence of the discussions at our meeting on

February 14. If you have questions with these notes, please feel free to

contact me. We will also review these notes as the first agenda item at

our next meeting.

Looking forward to seeing you again-3.2.11 in Wells-6:00 for the tour and

6:30 for the business meeting!

C: Ernie Virgil

John Zeis

Pat Michel

Suzanne Spear

Jay O’Connor

**MEMORANDUM**

TO: Lake Pleasant/Wells Merger Study Advisory Committee

FROM: Alan Pole and Bill Silky

RE: Meeting Notes-Meeting of March 2, 2011

DATE: March 9, 2011

Present: Sheri Babcock, John Collado, Joy Eliezer, Jean Frederick, Sheila Jazeboski, Dickie Mayers, Sharon Parslow, Ed Pruden, Jessica Robinson, Barbara Schoonmaker, Stephanie Smith, Yvonne Snider, Sandy Stuart, Jon Swift, Kirsten Tarnowski, Nancy Venier, Cynthia Viacava

Consultants: Alan Pole, Bill Silky, Patti Service

Superintendent Advisors: Ernie Virgil and John Zeis

Observers: Brandy Richards, Brian Richards, Florence Braunius, Chris Hayes, Dorman Reese, Kathleen Towers, Ken Hoffman, Michelle Barrows, Debbie Taylor, Pamela Pooler, Barbara Van Slyke, Rosemary Tracy, Heather Philo, Christine Michienzi, J. Bobbette, Crystal Reese-Persch, and Leona Aird.

Location: Wells Central School Cafeteria

1. Bill Silky opened the meeting by thanking Sharon Parslow for providing a tour of the Wells school that was conducted for those interested. He also told the committee that the discussion from the February 14th meeting undoubtedly evoked a lot of discussion and concern. However, Bill said that difficult issues such as the possibility of reducing the number of elementary sections and hence jobs must be discussed and cannot be elephants in the room. He then encouraged the committee members to share their reactions and discussions with others since the last meeting. Several committee members raised concerns they felt and/or had heard including the possibility of people losing jobs, parents concerned about transportation/distance (Bill mentioned this would be the focus of the next meeting), a reduction of art at Wells, perhaps keeping the primary grade students in each of the current districts, among other issues. Bill stressed that it is important to know what the concerns are so that the final consultant recommendations will be sensitive to the local history and culture.
2. Bill Silky walked the committee through a packet of materials that included revised tables from previous meetings. The live birth data now includes children born in 2009 and he showed how this slightly altered the districts’ enrollment projections. Minor adjustments were made to a couple of tables (grade configurations and daily schedules) to make them more accurate. Based on committee request, statewide elementary grade level class size averages were added to the table showing elementary sections and section sizes. Based on the committee request, the number of students (in addition to the percentage) scoring at each level on state tests for grades 3-8 and Regents exams were added. He reminded the committee that the study is a work in progress and continual updates/additions will be shared as the study moves along.
3. The primary focus of this meeting was to review the financial condition of each district and the financial impact of a merger. Alan walked the committee through a packet of materials that outlined these issues. He explained how state aid works conceptually (poor districts get more aid than wealthy districts). Alan then demonstrated why New York State views both Wells and Lake Pleasant as wealthy districts and the aid implications of this. He reviewed the budget voting history in each district and indicated this is a barometer of community support for the school. Alan reviewed the current reserves, fund balance, and audit reports of each district indicating that sound fiscal planning has occurred in each district. The true value tax rates of Wells and Lake Pleasant were presented and discussed. Alan discussed the practice in both districts of providing free lunches to all students and how this is quite rare and will have to be considered if a merger occurs. Before going into the financial implications of a merger, Alan explained why the current fiscal crisis has created an unprecedented challenge for all school districts. The committee was informed of the incentive aid process and how this would impact a Wells-Lake Pleasant merger that would be very minimal ($422,560 over 14 years) and its likely impact on the tax rate. In conclusion he stated that the financial benefits of additional aid would be very small and that if a merger were to occur the financial benefit would have to come from savings due to being more efficient. Finally, the debt schedules of Wells and Lake Pleasant were presented. Alan discussed how a merger would affect the current debt payments and how special state aid could help fund future capital projects. This discussion ended with a general overview of possible ways a merged district might save money and Alan indicated we would explore some of these and present results at a future meeting.
4. The meeting concluded with the public comment/questions. Some of the questions/comments included the impact on UPK programs, what might happen to athletics and league affiliation, high school students that currently attend Johnstown (the Lake Pleasant Board has already decided if a merger occurs no students would be going to Johnstown), how the current boards might agree on a plan and their agreements impact on a future unknown board, and the study process from this point forward.

The meeting concluded at 9:50.

**MEMORANDUM**

TO: Lake Pleasant/Wells Merger Study Advisory Committee

FROM: Alan Pole and Bill Silky

RE: Meeting Notes-Meeting of March 14, 2011

DATE: March 15, 2011

Present: Committee Members-Julie Atty, Joy Eliezer, Jean Frederick, Sheila Jazeboski, Cristen Jones, Dickie Mayers, Sharon Parslow, Ed Pruden, Barbara Schoonmaker, Katie Smith, Stephanie Smith, Yvonne Snider, Jon Swift, Jessica Robinson, Kirsten Tarnowski, Nancy Venier, Cynthia Viacava

Consultants: Alan Pole and Bill Silky

Superintendent Advisors: Ernie Virgil and John Zeis

Observers: Chris Hayes, Dee Parker, Barbara VanSlyke, Joan Bobbette, Pamela Pooler, Kathleen Towers, Heather Philo, Rosemary Tracy, Dick Eliezer, Mindy Morrison, Jen Braunius, Christine Michienzi, Linda Spengler, Dorean Page, and Florence Braunius

Location: Lake Pleasant Central School

1. Alan Pole thanked Ernie Virgil for the tour of the Lake Pleasant School and explained the difference between a school ***district*** and a school ***building***. The purpose of this study is to examine the feasibility of merging the Lake Pleasant and Wells school ***districts***.

2. An opportunity was provided to comment or ask questions about the notes from the committee meeting of March 2.

3. Bill Silky reviewed the results of the opinion poll to which 17 committee members responded. In reaction to the poll, people responded as follows:

a. there is more interest in maintaining and improving the educational program than in holding down taxes;

b. most people favor a pre-K-5, 6-8, 9-12 grade configuration;

c. respondents would prefer students to be on buses no more than 30-60 minutes;

d. the financial incentives of a merger do not seem very significant to most people;

e. most respondents believe that the free breakfast and lunch program should be discontinued so it does not cost the district money.

The committee also felt that students should have some input into the decisions that were being made about their districts. The two superintendents and consultantswill take that under consideration and think about explaining the direction of the committee’s work to the students and getting their input.

4. Bill Silky provided an overview of the facilities and transportation systems for both districts. Highlights include the following:

a. The facilities for both districts are in good shape. As a result of recent building condition surveys, architects have recommended that additional work should be done in the buildings at a cost of approximately $300-500,000 for each district;

b. Both buildings are adequate in size to house the students that currently attend school in those buildings;

c. It is common for outside community groups to use the school facilities for their functions;

d. Both districts have bus fleets that are relatively new, well maintained, and adequate for the transportation needs of the districts;

e. Mindy Morrison and Ernie Virgil reviewed the bus routes for each district. Bus runs in the districts currently range from 35-60 minutes.

5. Conversation took place with respect to the grade/building configurations that should be considered should the districts merge. Options considered included the following:

a. K-6 at Lake Pleasant; 7-12 at Wells

b. K-4 at each district; 5-8 at Lake Pleasant; 9-12 at Wells

c. K-5 in each district; 6-8 at Lake Pleasant; 9-12 at Wells;

d. K-6 in each district; 7-9 in Lake Pleasant; 10-12 in Wells

It was the general feeling of the committee that the communities are interested in keeping their elementary students in their local community schools. There were also questions raised about certification issues for teachers who would be teaching in the middle school. Further discussion about these issues will take place at the next meeting that will deal with staffing.

6. The next meeting will be held on Wednesday, March 30, 2011 at 6:30 in Wells.

We believe this covers the essence of the discussions at our meeting on March 14. If you have questions with these notes, please feel free to contact me. We will also review these notes as the first agenda item at our next meeting.

Looking forward to seeing you again-3.30.11 in Wells at 6:30!

C: Ernie Virgil

John Zeis

Pat Michel

Suzanne Spear

Jay O’Connor

**MEMORANDUM**

TO: Lake Pleasant/Wells Merger Study Advisory Committee

FROM: Alan Pole and Bill Silky

RE: Meeting Notes-Meeting of March 30, 2011

DATE: March 31, 2011

Present: Committee Members-Julie Atty, Sheri Babcock, John Collado,

Joy Eliezer, Jean Frederick, Sheila Jazeboski, Dickie Mayers, Sharon

Parslow, Ed Pruden, Barbara Schoonmaker, Katie Smith, Yvonne Snider,

Jon Swift, Jessica Robinson, Kirsten Tarnowski, Nancy Venier, Cynthia

Viacava

Consultants: Alan Pole and Bill Silky

Superintendent Advisors: Ernie Virgil and John Zeis

Observers: Pamela Pooler, Linda Spengler, Christine Michienzi, Rosemary

Tracy, Heather Philo, Laura O’Connor, Barbara Van Slyke, Florence

Braunius, Casandra Hunter, Dick Eliezer, Chris Hayes, Andrew Weaver,

Joan Bobbette, Den Hoffman, Dorman Reese, Kenneth Chicoski,

Kathleen Towers, Grace Morrison, Judy Sterling, Crystal Reese-Peracle,

Courtney Bovee, Deneen Parker, Debbie Taylor, Michelle Barrows

Location: Wells Central School Cafeteria

1. Bill Silky opened the meeting at 6:30. Attendance sheets were

circulated and he reviewed the overall agenda for the meeting.

2. Bill invited the committee to offer any questions and/or concerns after

reading the minutes from the previous meeting; there were none. He

informed the committee that following the last meeting the

superintendents have agreed to meet with high school students from

both districts, in small groups, to solicit their input on the study findings

and recommendations prior to it being finalized and presented to the

boards. This was a concern the committee raised at the last meeting.

Bill also told the committee that the question raised last meeting about

pre-K funding continuing after a merger was posed to the State

Education Department and the representative was not able to provide an

answer. The Department has never been asked this question.

3. A summary of potential cost savings was presented to the committee.

This summary was developed by Alan and Bill in consultation with the

two district superintendents after reviewing each district’s line item

budget. The combined total estimated efficiencies plus incentive aid and

discontinuance of general fund support of free lunches was shown. Bill

informed the committee that additional building aid for current Lake

Pleasant debt is still being calculated and will be provided at the next

meeting; however, it appears it will be substantial. A committee member

pointed out that there would also be some district savings for athletic

league dues following a merger.

4. Alan presented information on the main topic of the evening: staffing

and contracts.

a. He stressed that schools are labor intensive and that employee

salaries and benefits represent 70% or more of a school district’s budget.

This then led into a presentation comparing the provisions (working

conditions, salary, benefits, etc.) of each district’s current contract with

the teacher associations. Alan explained how teacher salary schedules

are constructed, presented average teacher salaries for each district, and

explained what it would take to “level-up salaries” if merged ($91,523).

He indicated that there is no requirement to level-up salaries, but in the

past, it has always been done following a merger.

b. Alan reviewed coaching salary stipends and said that the difference

was inconsequential as are stipends for supervising extra-curricular

activities.

c. He pointed out that administrative efficiencies would be about

$51,300 with one superintendent and one principal still in place.

d. Support staff contracts in both districts expire in 2011. Alan

presented the comparison of the two districts and concluded that there

are not huge differences in salary and benefits between the two districts.

e. Finally, health insurance plans and costs were compared for the

two districts.

5. Alan presented five possible options for configuring the

grades/schools under a merged scenario, along with advantages and

disadvantages of each. He invited the committee to add additional

advantages and/or disadvantages to the list. It was agreed that option 1

(all PK-12 housed in individual schools) was not a feasible option. An

additional disadvantage to option 2 (all Pk-6 in one building and all 7-12

in another) was noted as inconvenience for parents. Option 3 (PK-6 in

each school and 7-12 in one building) brought the following additions:

Advantage-PK in each building keeps the young children close to home;

Disadvantages-there would be too much empty space in Lake Pleasant

and the PK-6 program would lose some of the advantages of having high

school staff in the same building. Also, it is doubtful that PK-6 and 7-12

would fit in either of the existing buildings.

6. Bill mentioned to the committee that a second opinion poll would be

conducted between this meeting and the next to solicit individual

committee member’s thoughts.

7. The meeting was opened to the observers present. Several questions

were asked including (a) would the elementary students lose out by not

having the secondary program in the same building under various

options? And (b) in a few years is it likely that a school would have to be

closed?

8. The next meeting will be held on Monday, May 2, 2011 at 6:30 in Lake

Pleasant.

We believe this covers the essence of the discussions at our meeting on

March 30. If you have questions with these notes, please feel free to

contact me. We will also review these notes as the first agenda item at

our next meeting.

Looking forward to seeing you again-5.2.11 in Lake Pleasant at 6:30!

C: Ernie Virgil

John Zeis

Pat Michel

Suzanne Spear

Jay O’Connor

Sean Maguire

Appendix B

Efficiencies in a Merged District

MEMORANDUM

TO: Bill Silky

FROM: Alan Pole

RE: Efficiencies in a Merged Lake Pleasant-Wells School District

DATE: March 15, 2011 (updated April 4, 2011)

The following is a summary of the discussion we had on Monday, March 14 with Ernie Virgil and John Zeis regarding budget efficiencies/savings and additional revenues that might be generated should a merger of Lake Pleasant and Wells take place:

***A. BUDGET EFFICIENCIES/SAVINGS:***

1. Eliminate 1 superintendent @ $118,000 and hire 1

principal @ $80,000. Savings = $38,000 + 35%

in fringe benefits…………………………………….…………………… $51,300

2. NYSSBA dues………………………………………………………………… 2,600

3. Fiscal advisor…………………………………………………………………. 1,000

4. CASDA membership……………………………………………………. …… 100

5. District clerk…………………………………………………………………… 2,500

6. Staff in the treasurer’s office…………………………………………..………. 40,000

7. Auditing services………………………………………………………………. 7,500

8. Tax collector…………………………………………………………………... 2,000

9. NYSCOSS dues for the superintendent……………………………………….. 1,000

10. Legal services……………………………………………………...…………. 4,000

11. Liability umbrella insurance…………………………………………...……. 5,000

12. Clear track software……………………………………………..…………… 4,000

13. BOCES library and audio visual services…………………………………… 5,000

14. Student data base……………………………………………….…………… 5,000

15. School doctor………………………………………………..………………. 1,000

16. BOCES health and safety base fee…………………………….……………. 1,000

**TOTAL EFFICIENCIES/SAVINGS= $134.340**

***B. 1/3 INCENTIVE OPERATING AID FOR FIRST 5 YEARS* = $14,827**

***C. SCHOOL LUNCH FUND ($72,736 + $72,531)* = $145,267**

***D. ADJUSTED BUILDING AID (LP DEBT) FOR 17 YEARS=* $96,583**

**EFFICIENCIES/SAVINGS + ADDITIONAL REVENUES = $ 391,097**