



School District Optimization Assessment Study

*Phase 1: Interim Assessment Report
December 16, 2024*

Strategic Intent

What is the optimal configuration of school facilities to provide the best possible educational experiences, maximize organizational capacity, and lead to financial sustainability?

The driving purpose for the optimization assessment is to cultivate insights and recommendations for consideration that support the District's positioning for a sustainable and successful educational future, with an unrelenting focus on educational quality, operational excellence, and fiscal responsibility.



Phase 1: Interim Assessment Report 12/16/24



Timeline

September 5, 2024	Kick-off Meeting with Superintendent & Business Official (virtual)
September 18, 2024	Site Visit - Tour Facilities & Individual Interviews
October 2024	Document Review
Nov 2024	Financial Sustainability Analysis Develop Interim Assessment Report
December 16, 2024	Present Interim Assessment Report



Phase 1: Interim Assessment Report 12/16/24



Scope of Inquiry

Document Review

Enrollment - current figures, live births figures, etc.

Instructional Program - class sizes, grade level configurations, etc.

Special Education & Student Services - local & BOCES programs, student needs, etc.

Operations - staffing allocations, shift schedules, monitoring systems, etc.

Facilities - maps, usage studies, etc.

Transportation - fleet inventory, routes, etc.

Human Capital - instructional staffing, years of service/experience distributions, etc.

Finances - long-range budget planning documents, operating budget monitoring, etc.

Individual Interviews

Business Administrator

Brittany Carey

Director of Pupil Personnel Services (PPS)

Shannon Cavanaugh

Director of Curriculum & Technology

Sarah Wittmeyer

Director of Facilities

Scott Christ

Elementary School Principal

Kelly Wetzeler

High School Principal

Jason Jacobs

Board of Education

Russel Clothier, Jr. & Mary Jo Szucs

Teamsters

Tammy Regnier & Brian Ash

HTA

Melanie Hulton and Edward Foeller

Superintendent of Schools

Eric Lawton



Phase 1: Interim Assessment Report 12/16/24



Optimization Assessment - Site Visits & Individual Interviews

Summary of Key Themes from Stakeholder Conversations

Arguments FOR Closing a Building

- Financial Necessity
- Efficiency Improvements
- Alignment with Enrollment Trends
- Opportunity for Modernization
- Potential Community Use

Arguments AGAINST Closing a Building

- Community Attachment
- Disruption to Students & Staff
- Loss of Specialized Facilities
- Potential for Future Growth
- Impact on Educational Programs
- Historical Significance



Phase 1: Interim Assessment Report 12/16/24



Optimization Assessment - Site Visits & Individual Interviews

Stakeholder Conversations about Potential Repurposing of Closed Buildings

Potential Benefits

- Community Resources
- Financial Sustainability
- Preservation of Value
- Gradual Transition
- Enhanced Community Services

Potential Challenges

- Balancing Uses
- Security Concerns
- Maintenance Costs
- Community Expectations
- Regulatory Compliance
- Long-term Viability

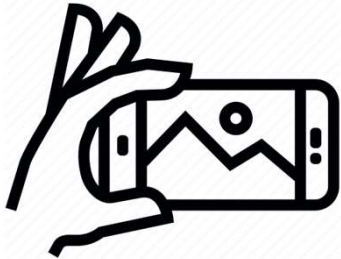


Phase 1: Interim Assessment Report 12/16/24

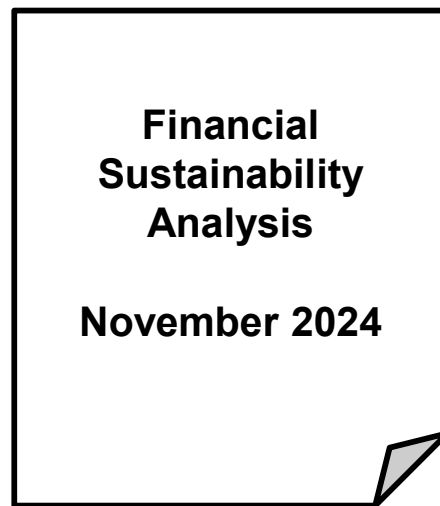


Optimization Assessment – Financial Sustainability Analysis

External, Independent Review of Finances by Retired School Business Official



All data for this report is a “**snapshot**” in time and/or includes assumptions/projections that may change at later dates.



Fiscal Health

- Fund Balance
- State Aid
- Revenues
- Expenditures

Long Range Planning

- Current Budget Trajectory
- “Save Harmless” Impact



Phase 1: Interim Assessment Report 12/16/24



Optimization Assessment – Financial Sustainability Analysis

External, Independent Review of Finances by Retired School Business Official

General Fund Balance	as of June 30, 2024
Non-spendable	\$2,906
Restricted Reserves	\$2,975,016
Assigned Fund Balance	\$648,023
Unassigned Fund Balance	\$1,418,317
Total Fund Balance	\$5,044,262

*In October 2024, the voters approved the use of the capital reserve in the amount of \$1,000,000 (the transfer to the capital fund will essentially deplete the capital reserve).

The unassigned fund balance is limited by statute to 4% of the upcoming year's budget. As of June 30, 2024, this represented 3.10%.



Phase 1: Interim Assessment Report 12/16/24



Optimization Assessment – Financial Sustainability Analysis

External, Independent Review of Finances by Retired School Business Official

Projected 2024-25 State Aid

Type of State Aid	Amount
Foundation Aid	\$7,348,579
Building Aid	\$1,682,576
Transportation Aid	\$954,341
BOCES Aid	\$1,197,827
High/Private Excess Cost Aids	\$321,469
Instructional Materials Aid	\$69,348
TOTAL	\$11,574,140

← **Save Harmless Status**
(\$1,616,212)
28%



Phase 1: Interim Assessment Report 12/16/24

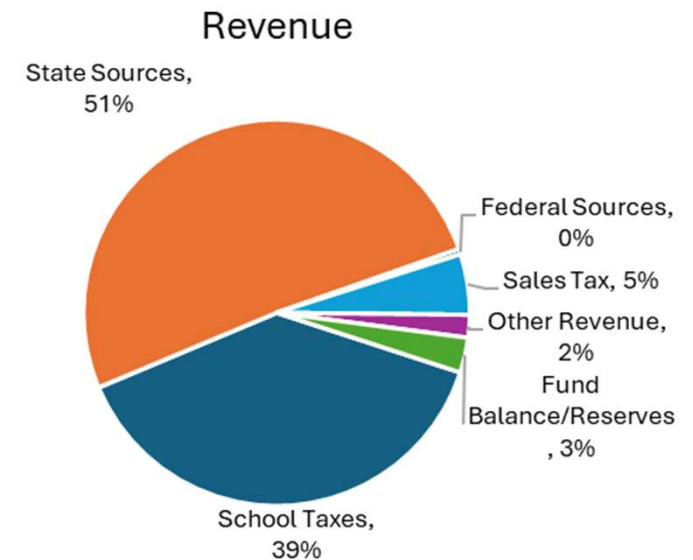


Optimization Assessment – Financial Sustainability Analysis

External, Independent Review of Finances by Retired School Business Official

General Fund 2024-25 – Revenues

Revenue Source	Amount
School Taxes	\$8,759,346
State Sources	\$11,548,872
Federal Sources	\$100,000
Sales Tax	\$1,150,000
Other Revenue	\$430,933
Fund Balance/Reserves	\$663,296
TOTAL	\$22,652,447



Phase 1: Interim Assessment Report 12/16/24

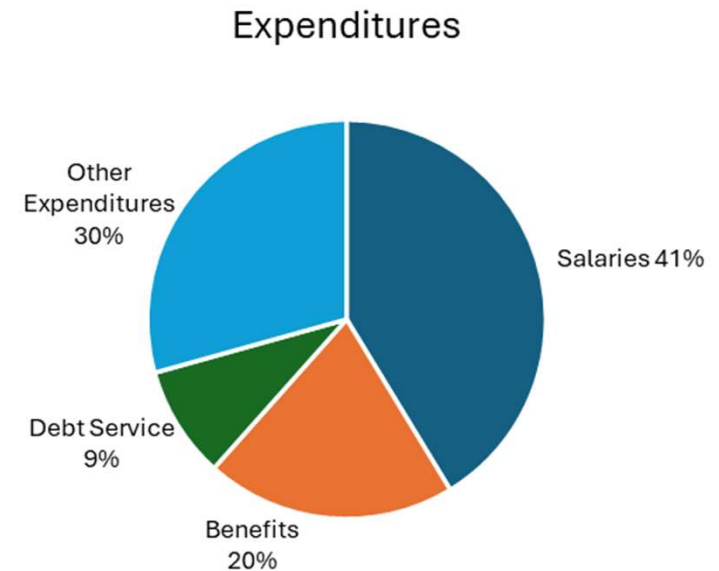


Optimization Assessment – Financial Sustainability Analysis

External, Independent Review of Finances by Retired School Business Official

General Fund 2024-25 – Expenditures

Expenditures	Amount
Salaries	\$9,355,286
Benefits	\$4,599,009
Debt Service	\$ 2,058,222
Other Expenditures	\$ 6,639,930
TOTAL	\$22,652,447



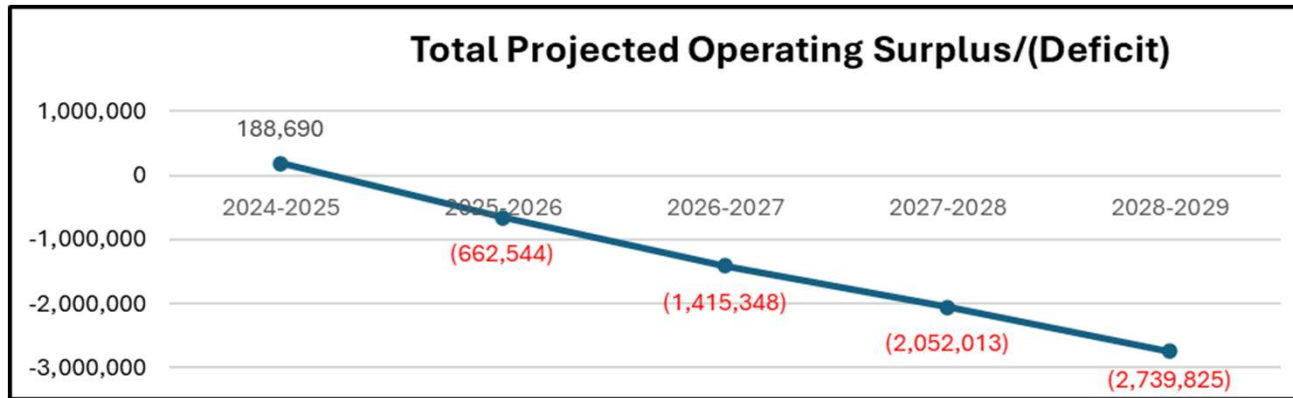
Phase 1: Interim Assessment Report 12/16/24



Optimization Assessment – Financial Sustainability Analysis

External, Independent Review of Finances by Retired School Business Official

Long-Range Plan – Current Trajectory



	2023-24 Audited	2024-25 Projection	2025-26 Projection	2026-27 Projection	2027-28 Projection	2028-29 Projection
Revenues	\$22,037,900	\$22,120,455	\$22,122,006	\$22,393,325	\$22,393,521	\$22,756,933
Expenditures	\$20,786,457	\$21,931,765	\$22,784,551	\$23,808,673	\$24,445,534	\$25,496,757
Operating Surplus (Deficit)*	\$ 1,251,443	\$ 188,690	\$ (662,545)	\$ (1,415,348)	\$ (2,052,013)	\$ (2,739,824)

Revenue Assumptions

- Foundation Aid: 0% per year
- Expenditure-driven State Aid (excluding Building Aid) is projected to increase modestly each year
- Tax Levy at estimated Tax Levy Limit with a 2% growth factor

Expenditure Assumptions

- Salaries based on current staff with expected contractual increases
- Health Insurance projected at medical trend of 7% annually
- Other costs, including BOCES are projected to increase modestly

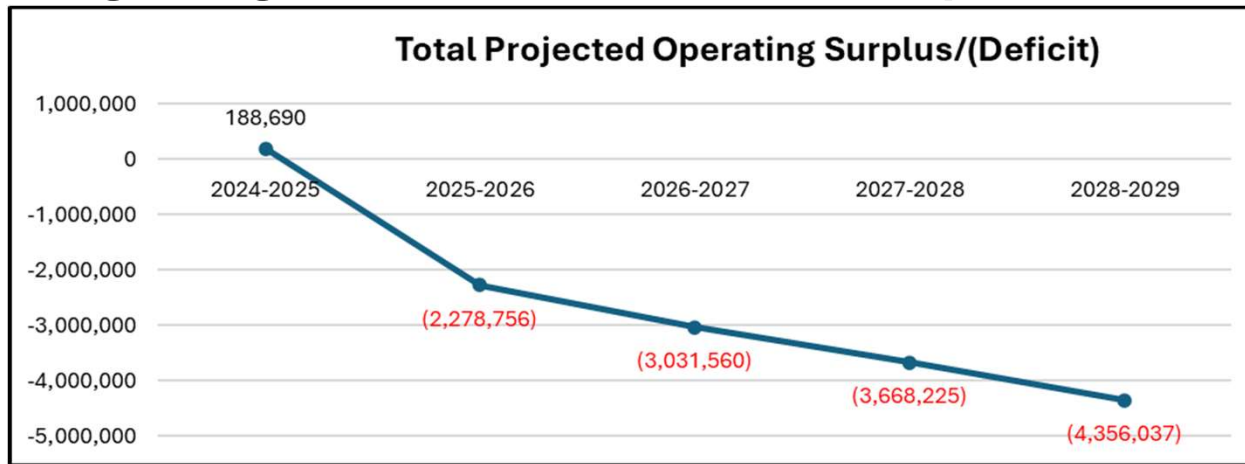
It is anticipated expenditures will outpace forecasted revenues over time. The average annual increase in expenditures is expected to range from 4.6% - 5.4% while revenue increases range from 0.00% - 1.62%.



Optimization Assessment – Financial Sustainability Analysis

External, Independent Review of Finances by Retired School Business Official

Long-Range Plan – Save Harmless Impact



All previous variables remain constant for Revenues & Expenditures.

***IF* Save Harmless is eliminated**

2024-25 Foundation Aid

Calculated Aid	\$5,732,367
Current Payable Aid	\$7,348,579
Save Harmless	(\$1,616,212)
	-28%

	2023-24 Audited	2024-25 Projection	2025-26 Projection	2026-27 Projection	2027-28 Projection	2028-29 Projection
Revenues	\$22,037,900	\$22,120,455	\$20,505,794	\$20,777,113	\$20,777,309	\$21,140,721
Expenditures	\$20,786,457	\$21,931,765	\$22,784,551	23,808,673	\$24,445,534	\$25,496,757
Operating Surplus (Deficit)*	\$ 1,251,443	\$ 188,690	\$(2,278,757)	\$(3,031,560)	\$(3,668,225)	\$(4,356,036)

The potential elimination of the save-harmless provision would have a catastrophic impact on the budget and, most importantly, draconian cuts to programs and people.



Optimization Assessment - Potential Pathways of Exploration

Option A - Close Elementary School

Reconfigure Grades PK-6 at Middle School & Grades 7-12 at High School

Repurpose ES building: District Office, Regional Special Education & Alternative Education Programs

Option B - Close Middle School

Reconfigure Grades PK-6 at Elementary School & Grades 7-12 at High School

Repurpose MS building: District Office, Regional Special Education Classes, Alternative Education, & CTE Programs

Pursue Lease or Sale Over Time

Option C - Close High School

Reconfigure Grades PK-6 at Elementary School & Grades 7-12 at Middle School

Repurpose HS building: Regional Special Education, Alternative Education, & CTE Programs

Pursue Lease or Sale Over Time

Option D - NO Building Closures or Reconfigurations



Phase 1: Interim Assessment Report 12/16/24



Optimization Assessment Rating Scale

Improbable

Doubtful

Neutral

Possible

Probable

Best possible educational experiences
improbable that considered change will lead to positive outcomes; instead, negative consequences and resistance are expected

Maximize organizational capacity
improbable that considered change will improve capacity and may lead to severe disruptions and challenges to organizational efficiency and effectiveness

Lead to financial stability
improbable for any financial upside and most likely may lead to significant financial challenges and unsustainable budgetary pressures



Best possible educational experiences
probable that considered change will lead to transformative improvements and excellence in educational practices

Maximize organizational capacity
probable of significant positive changes, increased adaptability, and excellence in organizational capacity efficiency and effectiveness

Lead to financial stability
probable of substantial improvement in financial stability, strategic budget sustainability, and enhanced financial well-being



Phase 1: Interim Assessment Report 12/16/24



Optimization Assessment - Potential Pathways of Exploration

Options represent decisions that can be made within current BOE authority

Optimization Assessment Rating Scale: Improbable - Doubtful - Neutral - Possible - Probable

Option A - Close Elementary School

Best possible educational experiences	<i>Possible</i>
Maximize organizational capacity	<i>Possible</i>
Lead to financial stability	<i>Improbable</i>

Option B - Close Middle School

Best possible educational experiences	<i>Possible</i>
Maximize organizational capacity	<i>Possible</i>
Lead to financial stability	<i>Possible</i>

Option C - Close High School

Best possible educational experiences	<i>Possible</i>
Maximize organizational capacity	<i>Possible</i>
Lead to financial stability	<i>Doubtful</i>

Option D - NO Building Closures or Reconfigurations

Best possible educational experiences	<i>Neutral</i>
Maximize organizational capacity	<i>Doubtful</i>
Lead to financial stability	<i>Improbable</i>



Phase 1: Interim Assessment Report 12/16/24



Option A - Close Elementary School

Reconfigure Grades PK-6 @Middle School and Grades 7-12 @ High School

Repurpose Elementary School Building:

Relocate District Office

Pursue regional special education & alternative education programs

Optimization Assessment Rating Scale: Improbable - Doubtful - Neutral - Possible - Probable

Optimization Assessment Rating

Best possible educational experiences
Maximize organizational capacity
Lead to financial stability

Possible
Possible
Improbable



Phase 1: Interim Assessment Report 12/16/24



Option A - Close Elementary School, Grades PK-6 @MS, 7-12 @HS

Elementary School Considerations from Stakeholder Conversations

- **Enrollment** - excess capacity with declining enrollment trends
- **Community Attachment** - new all-inclusive playground
 - Harold O. Brumsted name
- **Facilities** - older facility with maintenance needs
- **Location** - closer to HS, track/field, bus garage
- **Space Utilization** - in-classroom bathrooms needed for PK -1st grade
- **Program Considerations** - early childhood education program needs



Phase 1: Interim Assessment Report 12/16/24



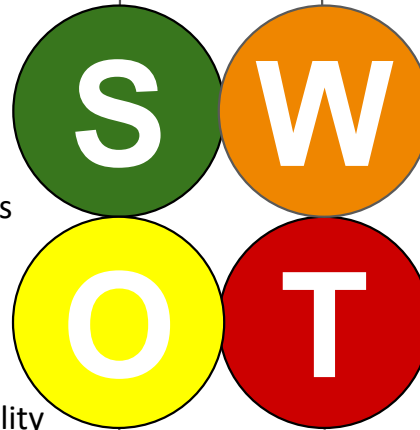
Option A - Close Elementary School, Grades PK-6 @MS, 7-12 @HS

Strengths

- + **Shared Staffing** eliminates some current shared staff travel and increases potential for more sharing
- + **Cost Savings** with closing a building saves personnel costs of building specific positions (principal, office staff, etc.)
- + **Reduction in Maintenance & Operational Expenses** associated with use of three buildings
- + **Reduce ES Facility Sustainability Maintenance** costs due to age and anticipated needs

Opportunities

- + **Program Enhancements & Expansions** availability of PK-6 and 7-12 staffing leads to different collaborations and options for students
- + **Access to improved program facilities** for grades PK-5 - pool, auditorium, art, physical education, etc.
- + **Increase Revenue** through the addition of regional special education, alternative education and/or CTE programming



Weakness

- MS Building Costs** needed *renovations*: —
classroom bathrooms for early grades,
classroom learning spaces, cafeteria, and
age-appropriate playground needed
- Debt Service** costs remain for ES facility —
- ES Landlocked Location** means less likely or —
desirable for lease or sale
- HS Classroom Dimensions & Infrastructure** —
less conducive to flexible learning spaces

Threats

- Public Sentiments of Loss** with ES building named —
after a prominent community member
- Cultural Shifts** in new grade configurations cause —
shifts for students, families, & staff
- Loss of Easy Access to All-Inclusive Playground** —
for ES students during school day

Option B - Close Middle School

Reconfigure Grades PK-6 @ Elementary School, Grades 7-12 @ High School

Repurpose Middle School Building:

Relocate District Office

Pursue regional special education, alternative education, & CTE programs

Pursue Lease or Sale:

Over time consider commercial value for sections or entire building/land

Optimization Assessment Rating Scale: Improbable - Doubtful - Neutral - Possible - Probable

Optimization Assessment Rating

Best possible educational experiences
Maximize organizational capacity
Lead to financial stability

Possible
Possible
Possible



Phase 1: Interim Assessment Report 12/16/24



Option B - Close Middle School, Grades PK-6 @ES, Grades 7-12 @HS

Middle School Considerations from Stakeholder Conversations

- **Historical Closure** - “been there, done that”
- **Facilities** - gyms, pool, land - higher repair & maintenance needs
- **Location** - on the main road in community with lots of space
- **Program Considerations** - swimming pool & athletic fields
- **Space Utilization** - room for reconfiguring grade levels - would need in-class bathrooms for early childhood education
- **Community Use** - swimming pool
- **Potential Commercial Value** - highest lease or sale value of buildings location and land



Phase 1: Interim Assessment Report 12/16/24



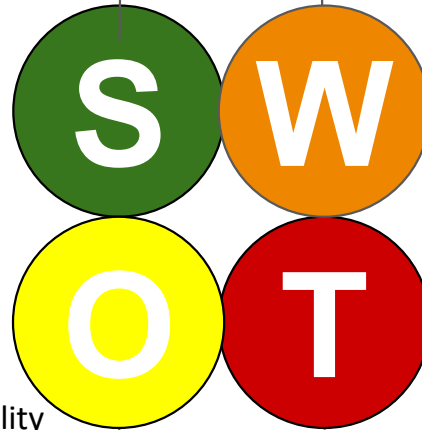
Option B - Close Middle School, Grades PK-6 @ES, Grades 7-12 @HS

Strengths

- + **Shared Staffing** eliminates some current staff travel and increases potential for more sharing
- + **Cost Savings** with closing a building saves personnel costs of building specific positions (principal, office staff, etc.)
- + **Keeps Early Childhood Classrooms at ES** eliminating potential for renovation costs
- + **Location & Land** has highest commercial value for leasing or sale options

Opportunities

- + **Program Enhancements & Expansions** availability of PK-6 and 7-12 staffing leads to different collaborations and options for students
- + **Increase Revenue** through the addition of regional special education, alternative education and/or CTE programming



Weakness

- HS Building Costs** needed renovations: —
some classrooms & cafeteria space
- HS Classroom Dimensions & Infrastructure** —
less conducive to flexible learning spaces
- ES Landlocked Location** limits additional —
outdoor spaces (instruction, play, & athletics)
- ES Facility Sustainability Maintenance** —
costs due to age and anticipated needs
- Debt Service** costs remain for MS facility —

Threats

- Public Sentiment of Loss** with MS building —
being previously closed then reopened
due to Board/community desire
- Cultural Shifts** in new grade configurations cause —
shifts for students, families, & staff

Option C - Close High School

Reconfigure Grades PK-6 @ Elementary School, Grades 7-12 @ Middle School

Repurpose High School Building:

Pursue regional special education, alternative education, & CTE programs

Pursue Lease or Sale:

Over time, consider commercial value for sections or entire building

Optimization Assessment Rating Scale: Improbable - Doubtful - Neutral - Possible - Probable

Optimization Assessment Rating

Best possible educational experiences
Maximize organizational capacity
Lead to financial stability

Possible
Possible
Doubtful



Phase 1: Interim Assessment Report 12/16/24



Option C - Close HS, Grades PK-6 @ES, Grades 7-12 @MS

High School Considerations from Stakeholder Conversations

- **Historical Significance** - strong community ties
- **Facilities** - newer auditorium, older building with maintenance needs
- **Enrollment** - available space & low class sizes with declining # of students
- **Location** - close to Elementary School, bus garage, and new track & field
- **Program Considerations** - music and fine arts using auditorium - concerns with enrollment about maintaining electives and programs



Phase 1: Interim Assessment Report 12/16/24



Option C - Close HS, Grades PK-6 @ES, Grades 7-12 @MS

High School Considerations from Stakeholder Conversations

- **Community Attachment** - see as point of pride with multi-generational attendance at building
- **Media Center** - good space for multiple uses - maker space
- **Classrooms** - older floor plans with longer, narrower rooms, not as conducive to modern open floor plans for flexible learning spaces



Phase 1: Interim Assessment Report 12/16/24



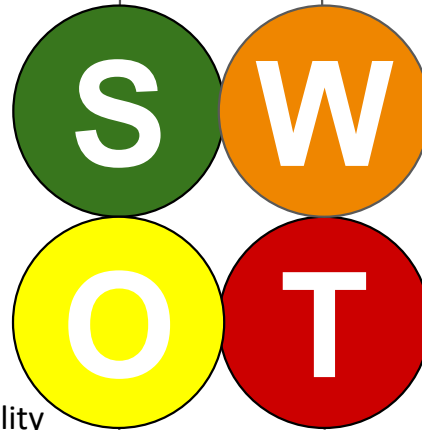
Option C - Close HS, Grades PK-6 @ES, Grades 7-12 @MS

Strengths

- + **Shared Staffing** eliminates some current staff travel and increases potential for more sharing
- + **Cost Savings** with closing a building saves personnel costs of building specific positions (principal, office staff, etc.)
- + **Keeps Early Childhood Classrooms at ES** eliminating potential for renovation costs
- + **District Office Remains** in current location

Opportunities

- + **Program Enhancements & Expansions** availability of PK-6 and 7-12 staffing leads to different collaborations and options for students
- + **Access to pool** for grades 9-12.
- + **Increase Revenue** through the addition of regional special education, alternative education and/or CTE programming



Weakness

- MS Building Costs** needed *renovations*: —
some classrooms need investment to support program needs
- ES Facility Sustainability Maintenance** —
costs due to age and anticipated needs
- Debt Service** costs remain for HS facility —
- Loss of Easy Access** to auditorium, —
media center, and new track & field

Threats

- Public Sentiment of Loss** with HS building —
being part of multi-generational experiences for community members
- Cultural Shifts** in new grade configurations cause —
shifts for students, families, & staff

Option D - NO Building Closures or Reconfigurations

Maintain Current Building Configurations

Elementary School (PK-5), Middle School (6-8), High School (9-12)

Budget Year 2025-26

Raise tax levy to minimum allowable tax cap calculation OR exceed tax cap
Reduce expenditures by increasing student-teacher ratios, reducing staff, & other program reductions

Future Budgets

Tuition HS students to other school programs
Consider merger with neighboring school

Optimization Assessment Rating Scale: Improbable - Doubtful - Neutral - Possible - Probable

Optimization Assessment Rating

Best possible educational experiences *Neutral*
Maximize organizational capacity *Doubtful*
Lead to financial stability *Improbable*



Phase 1: Interim Assessment Report 12/16/24



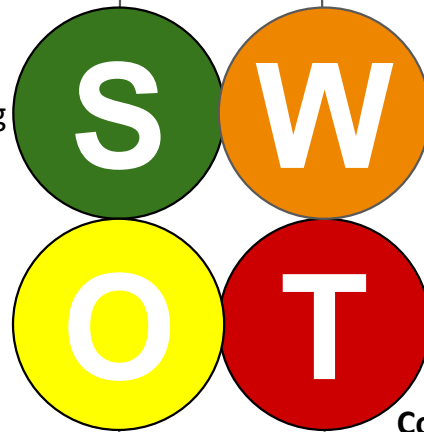
Option D - NO Building Closures or Reconfigurations

Strengths

- + **Nothing Changes in 2025-26** regarding grade configurations
- + **Right Sizing** staffing better meets the current enrollment and class sizes - mainly at 9-12
- + **Community Support** is aligned with preserving current configurations and programs

Opportunities

- + **Allows Additional Time** to examine financial constraints, program needs, and community expectations for 2026-27 and beyond
- + **Enhanced Utilization** by implementing shared staffing models, especially at secondary level



Weakness

- **Continued Financial Strain** due to predicted flat or reduced State Aid
- **Budget Challenges** are merely postponed, not addressed for sustainability
- **Balancing Budget through Staffing Reductions & Tax Increases ALONE** only mitigates 2025-26 year while requiring additional measures moving forward

Threats

- **Concerns** will emerge when right-sizing staffing to meet enrollment and class sizes
- **Higher Increase in Tax Levy** than historically experienced may lead to community tension
- **Depleting Reserves** will cause long-term financial strain

Optimization Assessment - Potential Pathways for Further Exploration

Optimization Assessment Rating Scale: *Improbable (-3) - Doubtful (-1) - Neutral (0) - Possible (1) - Probable(3)*

		Best possible educational experiences	Maximize organizational capacity	Lead to financial stability (x2)	Total Rating Scores
Option A	Close ES, Grades PK-6 @MS, 7-12 @ HS	Possible (1)	Possible (1)	Improbable (-3) x2 = -6	-4
Option B	Close MS, Grades PK-6 @ES, 7-12 @ HS	Possible (1)	Possible (1)	Possible (1) x2 = 2	4
Option C	Close HS, Grades PK-6 @ES, 7-12 @ MS	Possible (1)	Possible (1)	Doubtful (-1) x2= -2	0
Option D	No Building Closures or Reconfigurations	Neutral (0)	Doubtful (-1)	Improbable (-3) X2 = -6	-7



Phase 1: Interim Assessment Report 12/16/24



Optimization Assessment - Potential Next Step Recommendations

- **Comprehensive Analysis** - leverage this assessment for deeper analysis
- **Stakeholder Engagement** - proactively engage students, staff, and community in deeper analysis
- **Long-term Planning** - balance immediate financial needs with long-range educational needs
- **Strategic Planning** - develop a phased, data-driven 2-5 year plan
- **Thorough Transition Planning** - ensure detailed plans to minimize disruption for students, staff, and families
- **Transparent Communication** - open, regular updates
- **Community Messaging** - share the “why” and rationale



Phase 1: Interim Assessment Report 12/16/24



Potential Next Steps

1) Further explore potential pathways showing promise

		Best possible educational experiences	Maximize organizational capacity	Lead to financial stability (x2)	Total Rating Scores
Option B	Close MS, Grades PK-6 @ES, 7-12 @ HS	Possible (1)	Possible (1)	Possible (1) x2 = 2	4
Option C	Close HS, Grades PK-6 @ES, 7-12 @ MS	Possible (1)	Possible (1)	Doubtful (-1) x2= -2	0

2) Conclude Optimization Assessment Study with Interim Findings



Phase 1: Interim Assessment Report 12/16/24

