

**An Examination of Options Open to the  
Wheatland-Chili Central School District  
Board of Education  
in Response to Declining Enrollment**

**A Study Completed by**

**Dr. Brian Brent  
Dr. Sherri Lauver  
Dr. Stephen Uebbing**

**January 26, 2009**

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**In response to the request of the  
Wheatland-Chili Central School District  
Board of Education**

**January, 2009**

**Executive Summary**

On January 3, 2008, University of Rochester Warner School professors Brian Brent and Stephen Uebbing met with Thomas Gallagher, Superintendent of Schools of the Wheatland-Chili Central School District (WCCSD). The purpose of the meeting was to discuss the impact of declining enrollment on the District's ability to continue to provide a sound educational program to its students. Superintendent Gallagher and staff of the Wheatland-Chili Central School District had already completed extensive analysis of several key variables associated with these issues and had started an inquiry process within the District. However, Mr. Gallagher felt that his process had reached a natural boundary largely formed as a function of his position as Superintendent. The issues yet to be explored, he suggested, would be best visited by a disinterested third party capable of objective analysis, without the constraint of community loyalties or expectations.

Drs. Brent and Uebbing asked Mr. Gallagher to frame the specific questions he wished answered. Superintendent Gallagher's questions are as follows:

1. Can the Wheatland-Chili Central School District, with a student population of approximately 700, provide a comprehensive K-12 program in Monroe County over the next decade that is fiscally sustainable?
2. If a comprehensive program cannot be maintained in its current state, what options could be considered to reach that goal?
3. How would each of the possible options impact the district programmatically, fiscally, and (in terms of) community identity?
4. What data and resources are necessary to be compiled to respond to these questions?

A study team, consisting of Dr. Stephen Uebbing, Dr. Brian Brent, and Dr. Sherri Lauver, submitted a proposal to answer these questions to the WCCSD's Board of Education. The Board approved the proposal on March 10, 2008. In what follows, we consolidate our response to the Board of Education.

**1. Can the Wheatland-Chili Central School District, with a student population of approximately 700, provide a comprehensive K-12 program in Monroe County over the next decade that is fiscally sustainable?**

The Study Team conducted an analysis of program offerings in the WCCSD as well as districts contiguous to the WCCSD. In addition, the Team also reviewed offerings in schools of similar size and wealth to WCCSD that had been designated as "high-performing school districts" by the New York State Education Department. As a result of that analysis, the Team can make the following statements:

**If the WCCSD community wishes to offer a comprehensive program similar to that found in other Monroe County school districts, and maintain a true value tax rate consistent with tax rates throughout the county, we do not think that is possible in the traditional sense.**

We found that the course offerings and extracurricular activities at WCCSD, especially in the high school, did not reflect the full range of choices found in the contiguous districts. It is possible to further expand course offerings through web-based programs.

We also found that there are a number of districts with enrollment and wealth similar to WCCSD that are designated by the New York State Education Department as "High-Performing School Districts." It is abundantly clear that enrollment alone does not prevent WCCSD from offering a quality program as measured by student achievement. Indeed, Wheatland-Chili High School is designated as a "high-performing school" by NYSED.

**If the WCCSD community wishes to offer a quality pre K-12 education experience, as measured by the achievement of its students and maintain a true value tax rate consistent with tax rates throughout the county, there is little reason to believe that the current trend in enrollment will prevent it from achieving its goals.**

However, high performing and comprehensive are not the same thing. If the WCCSD desires to create a more comprehensive program, the District has three choices.

- Incorporate more "on line" or distance learning courses
- Provide more traditional classes
- Reorganize with another district

There are strengths and weaknesses with each option. The Wayne-Finger Lakes BOCES currently makes available Project Accelerate with a host of offerings including 13 advance placement classes and three (3) foreign languages. Most agree that it takes a highly motivated student to benefit from any kind of remote education program. Generally, students taking AP classes fit the description of the kind of student likely to benefit from on-line classes. Currently, Project Accelerate has a completion rate of 70%.

Traditional classes are a known commodity, but the most expensive option. WCCSD is already operating a very expensive secondary program given its enrollment. Adding classes would only increase its already high per student costs.

Reorganization offers the greatest opportunity for program enhancement without substantial tax increases. However, reorganization may have a dramatic impact on the WCCSD community.

**2. If a comprehensive program cannot be maintained in its current state, what options could be considered to reach that goal?**

We reviewed the law as well as the research and identified the following options:

- Pursue merger with another district either through centralization or annexation
- Create tuition arrangements for some or all WCCSD secondary students
- Expand non-traditional course offerings including web-based offerings and distance learning offerings

We discuss each of these options in depth. We do not make a specific recommendation regarding these options as that is beyond the purview of this work.

**3. How would each of the possible options impact the District programmatically, fiscally, and (in terms of) community identity?**

Our analysis of programmatic options is best found in the comparisons in Question 1. It is reasonable to conclude that if the WCCSD were to reorganize with or tuition its secondary students to contiguous districts, WCCSD students would have the opportunity to participate in the full range of offerings in the partner district(s). As each of those districts has a broader range of offerings than WCCSD, it is clear that **Wheatland-Chili students would benefit from enhanced program offerings if the District were to reorganize or send some or all of its secondary students to contiguous districts on a tuition basis.**

The second aspect of Question 3 is the financial impact of the various options reviewed in Question 2. Merger would result in a significant increase in state aid. The new district would receive “Reorganization Incentive Aid” (RIA) equal to a 40% increase in operating aid in the first five (5) years of reorganization. After that time, the aid decreases by 4% each year until it runs out. The basis of RIA does not change. Depending how the new board used that aid, the District could see a substantial decrease in local property taxes, albeit only for the life of the aid, or substantial program improvements. In reality, it is reasonable to suspect that the new district would seek some balance between the two.

On a more long-term basis, the new district would be eligible for “Reorganization Building Aid” (RBA). Under current formula, a reorganized district could see its aid ratio for capital projects increase to as much as 95%. We suspect that a WCCSD reorganization would result in a building aid ratio close to 90%. Inevitably the new district would do capital work over the

coming years, just as WCCSD will do work if it remains independent. The savings on debt service would be significant.

Therefore, we feel comfortable making the following statement:

**Merger, either through centralization or annexation, could result in increased state aid to the new district which could result in lower property taxes or improved student program during the period in which the district receives the additional aid.**

The option of tuition arrangements with contiguous districts for secondary students also has merit. In our analysis, we demonstrate that it would be substantially less costly to send secondary students, especially high school students, to contiguous districts than to educate them at Wheatland-Chili. That is partially because the Foundation Aid received for high school students does not begin to cover the actual costs. For the receiving district, if the number of tuition students is not too great, they can be largely absorbed into the existing program, thus creating efficiencies within their existing structure. Our analysis of savings is a fairly straightforward calculation. To understand the full cost and savings ramifications, it would be necessary to conduct an audit of existing costs for high school students, which is beyond the scope of this work. We do feel comfortable, however, making the following statement:

**The WCCSD could realize substantial savings while WCCSD students would realize increased programmatic offerings if high school students attended contiguous districts on a tuition basis.**

Again, this is not to be construed as a recommendation. The decision to dissolve the Wheatland-Chili High School is a weighty one, with dramatic implications for the community, its students, and the WCCSD faculty and staff.

The final option to be considered is an aggressive commitment to remote programs, such as web-based courses. We note the strengths and weakness of this option in Question 2. In terms of cost, web-based classes purchased through Project Accelerate are relatively inexpensive as they are eligible for BOCES aid. We anticipate that a typical class would cost the district approximately \$450 for Advanced Placement classes and \$400 for all other classes. The net cost to the district after BOCES aid would be much less.

The final aspect of Question 3 concerns community identity. The data for this question comes from a series of group discussions conducted after this study was presented to the community. A team of professors conducted focus group type activities with a broad array of district stakeholders. In addition, the district provided the opportunity for the community to answer the same questions posed in the focus groups either on line or using paper copy. Our analysis of this input allows us to make the following general statements.

**Overall there is a fairly consistent 2-1 or better opposition to any kind investigation of reorganization.**

Such opposition was strongest among faculty and parents. Of the larger population, however, a different picture emerges. There is much more interest in reorganization by residents *without* children in school than by parents. Of the respondents to the district survey who identified themselves as residents without children in school, half or better had an interest in a specific form of reorganization, 55% in merger and 48% in tuitioning.

Though the opposition to even investigating reorganization was strong among parents, we did hear the viewpoint in our focus groups that if enrollment continued to decline and taxes rose precipitously, investigating reorganization might be necessary.

**4. What data and resources are necessary to be compiled to respond to these questions?**

We accessed available data through the NYSED, Monroe County School Boards' Association, the United States Census, the New York State Department of Health, the Genesee/Finger Lakes Regional Planning Council, each of the districts contiguous to Wheatland-Chili, as well as the WCCSD. In addition, we conducted interviews with NYSED officials, local and regional developers, municipal officials, and officials from the contiguous districts as well as WCCSD. We also conducted two public meetings in the Wheatland-Chili community, offered the opportunity for small group sharing with faculty and staff at two different locations, and facilitated five small group sharing sessions with community members.

**What should the community expect now that the final study is presented to the community?**

It should be emphasized that at this point, the Board has not approached another district regarding reorganization. This study provides an information base to the Board of Education and community. Subsequent actions need to be decided by the Board of Education and community.



## **Section I: Overview**

On January 3, 2008, University of Rochester Warner School professors Brian Brent and Stephen Uebbing met with Thomas Gallagher, Superintendent of Schools of the Wheatland-Chili Central School District (WCCSD). The purpose of the meeting was to discuss the impact of declining enrollment on the District's ability to continue to provide a sound educational program to its students. Superintendent Gallagher and staff of the Wheatland-Chili Central School District had already completed extensive analysis of several key variables associated with these issues and had started an inquiry process within the district. However, Mr. Gallagher felt that his process had reached a natural boundary largely formed as a function of his position as Superintendent. The issues yet to be explored, he suggested, would be best visited by a disinterested third party capable of objective analysis, without the constraint of community loyalties or expectations.

Drs. Brent and Uebbing asked Mr. Gallagher to frame the specific questions he wished answered. Superintendent Gallagher's questions are as follows:

1. Can the Wheatland-Chili Central School District, with a student population of approximately 700, provide a comprehensive K-12 program in Monroe County over the next decade that is fiscally sustainable?
2. If a comprehensive program cannot be maintained in its current state, what options could be considered to reach that goal?
3. How would each of the possible options impact the district programmatically, fiscally, and (in terms of) community identity?
4. What data and resources are necessary to be compiled to respond to these questions?

A study team consisting of Dr. Stephen Uebbing, Dr. Brian Brent, and Dr. Sherri Lauver, submitted a proposal to answer the questions posed by the Superintendent Gallagher (see Appendix 1). The Board approved the proposal March 10, 2008. In what follows, we report our answer to each of the three guiding questions.

To facilitate the discussion, we have organized this report into six (6) sections. We use the first section to provide a brief comment on the organization of the WCCSD. Here we also present our forecast of enrollments using the cohort survival technique. Having these predicted enrollment figures in hand helps set the stage for the sections that follow.

Next, we present our responses to the questions posed by Superintendent Gallagher in turn. Our intent here is to inform WCCSC decision makers about the possible effects of different courses of action, including reorganization. We underscore that we present possible effects because we base our predictions of future enrollments, financing, and programming on past trends and current state regulations – all of which could change in the future. In addition, we caution readers not to interpret our analyses as a prelude to reorganization. When obtaining information from neighboring district officials, we made it clear that their willingness to engage us **did not demonstrate their interest in reorganizing with the WCCSD district.**

The study team then presents findings aligned with the specific questions posed by Superintendent Gallagher and approved by the Wheatland-Chili Central School District Board of Education. For each question the study team provides specified analysis, designated in the program proposal as “products.”

We close the report by summarizing our key findings. Initially, it was our intention not to make any specific recommendations. However, given the economic challenges the Wheatland-Chili District is expected to face, we do make recommendations to move the process forward in the event that the district feels it cannot meet its fundamental mission.

Limitations:

The goal of the study team was to answer the questions posed by Mr. Gallagher and approved by the Board of Education. This study, therefore, is an attempt to inform the decision makers of the Wheatland-Chili Central School District. It is not an automatic prelude to reorganization. In

obtaining information from neighboring districts, we made it abundantly clear that **the willingness of district officials to provide information does not in any way assume interest on any level in reorganizing with the Wheatland-Chili district.**

There are also limitations regarding the scope of the project. The study team looked at a limited number of comparison districts. The team did not survey out of state districts. New York has very specific school requirements that often exceed those found in other states. It would not be reasonable to compare program that is largely required against program that is not required. Nor will the researchers compare with non-public schools within New York State, as these schools are largely not subject to the full breadth of requirements found in public schools.

Enrollment, financial, and program analysis' have inherent limitations. Enrollment and financial analysis must be based upon trend data and existing state regulations. Either could change in the future.

## **Section II: Background**

The Wheatland-Chili School District is a centralized district in the southwest portion of Monroe County. WCCSD is a part of the Sole Supervisory District of Western Monroe County, generally known as Monroe BOCES 2. Michael O’Laughlin is the District Superintendent. As such, Dr. O’Laughlin serves as the Commissioner’s representative for the sole supervisory district.

The District was centralized in 1954 from seven (7) country school districts and the Village of Scottsville. The new District grew largely around the Village of Scottsville which remains the single largest population center and home to the District’s schools and support facilities.

Wheatland-Chili is contiguous to five (5) districts. The eastern border of the district is the Genesee River, across which is the Rush-Henrietta School District. Rush-Henrietta is a member of the Monroe 1 BOCES. Daniel T. White is the District Superintendent for the Monroe 1 BOCES. Rush-Henrietta is the closest among the five (5) districts to the Wheatland-Chili population center of Scottsville.

The Caledonia-Mumford School District borders the southern and much of the western part of the WCCSD. Caledonia-Mumford is a member of the Genesee Valley BOCES, where Dr. Michael Glover is District Superintendent. That Caledonia-Mumford is a member of the Genesee Valley BOCES is notable because reorganization among contiguous districts is usually undertaken within a BOCES. This does not mean reorganization between districts that are not members of the same BOCES cannot take place, but such a reorganization would have additional implications, especially regarding which vocational/technical education center students would attend. When interviewed, NYSED officials indicated that cross-BOCES reorganizations did not create undue issues at the state level. That said, the closest contiguous district high school to the Village of Scottsville is Caledonia-Mumford at 7.6 miles.

Wheatland-Chili has a direct, but very small border with the City of Rochester. In addition, the Rochester City School District is the furthest away from the main population center.

WCCSD also shares a common border with the Gates-Chili School District, though the common boundary is relatively small. Alternatively, WCCSD's contiguous boundary with Churchville-Chili School District is quite large, encompassing most of the northwestern border of the district. A map showing the Wheatland-Chili School District and its contiguous neighbors is included in the appendix.

### Board of Education Leadership

WCCSD's Board of Education has long demonstrated their desire to understand the efficacy and viability of the District's organization in the face of changing enrollments. For example, on September 24, 1985, the Wheatland-Chili Board of Education adopted a formal plan to study school facility use and school futures. This resulted in a comprehensive feasibility study between Wheatland-Chili and Rush-Henrietta conducted by the Study Council at Syracuse University overseen by Dr. Andrew Rossetti with assistance from Dr. Richard Castallo and Dr. Scott Shablak.<sup>1</sup> As a result of the efficiency study, the Boards of Education of the Wheatland-Chili and Rush-Henrietta opted not to pursue formal reorganization, but instead, to enhance shared services.

Current Board Goals: The Wheatland-Chili Central School District has lofty goals for its students and school. For example, its strategic plan has established a goal of 100% student graduation rate by June, 2009. Supporting that goal are eight (8) strategies based on best practice. It should be noted that few schools, even schools with very high socio-economic status, are able to achieve a 100% graduation rate. This goal speaks to the excellence to which the Wheatland-Chili Board of Education seeks from its program and operations.

The District also has a goal of maintaining a stable tax rate for which voters will still choose to maintain program quality in the District. The Board should be commended for its community outreach goals, including parent partnerships and goals around student health. For example, the District has a goal of increasing performance on the Incentive for Disease Control School Health Index. This includes outreach to staff and the community as well as the student body.

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<sup>1</sup> This group has conducted numerous reorganization studies and has extensive experience area of reorganization.

There is something of a dichotomy, however, between goals regarding high levels of student performance and a stable tax rate when the District is facing ongoing declining enrollment and no growth in its tax base. Enrollment decline has been a longstanding issue for the Wheatland-Chili Central School District. Just eleven years ago the District saw total enrollment in excess of 1,000 pupils. Today, school district officials are concerned that enrollment will decrease to approximately 700 pupils in the near future, and can only hope it stabilizes. It should be noted that the 2007-2008 enrollment was 761 not including students served off campus.

### **Section III: Enrollment Analysis**

The District commissioned a comprehensive enrollment study by the Genesee/Finger Lakes Regional Planning Council (G/FLRPC) in October, 2004. The Planning Council uses a very sophisticated approach and projected enrollment for the 2007-2008 school year at 877. The enrollment projection for 2009-2010 was 869. However, trends in the District did not continue as projected by GFLRPC. In fact, enrollment in 2007-2008 school year, including 25 students in BOCES placements, was 786 (as per District). This is not a reflection on the work completed by the GFLRPC. We think that it is a reflection of community infrastructure and economic issues. We will discuss the infrastructure issue further in this report. An updated enrollment projection using the cohort survival technique is included and suggests that in district enrollment will soon be less than 700 pupils, plus 25 or so out-placements.

*Table 1* indicates 14 years of enrollment history from 1990-91 through 2003-04. It is important to trace enrollment trends back that far in order to identify the specific points where enrollment declined. From a high of 1,118 in 1994-95, the District drifted down to 905 in 2003-04, a loss of 19%. Kindergarten enrollment went from a high of 89 in 1991 and 1992 to a low of 46 in 1999 and 47 in 2001. Indeed, Grade 1 enrollment in 1992 was 111. By 2002 that number was 46.

**Table 1 – Wheatland-Chili 14-Year Enrollment History**

|              | <u>1990-91</u> | <u>1991-92</u> | <u>1992-93</u> | <u>1993-94</u> | <u>1994-95</u> | <u>1995-96</u> | <u>1996-97</u> | <u>1997-98</u> | <u>1998-99</u> | <u>1999-00</u> | <u>2000-01</u> | <u>2001-02</u> | <u>2002-03</u> | <u>2003-04</u> |
|--------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| K            | 83             | 89             | 89             | 88             | 88             | 70             | 77             | 73             | 72             | 46             | 62             | 47             | 64             | 51             |
| 1            | 96             | 100            | 111            | 104            | 102            | 88             | 85             | 65             | 65             | 85             | 50             | 69             | 46             | 65             |
| 2            | 90             | 89             | 84             | 106            | 100            | 85             | 88             | 78             | 60             | 77             | 76             | 59             | 75             | 52             |
| 3            | 75             | 88             | 89             | 85             | 104            | 95             | 78             | 90             | 70             | 62             | 70             | 79             | 53             | 66             |
| 4            | 81             | 69             | 92             | 87             | 88             | 94             | 99             | 81             | 85             | 78             | 62             | 79             | 68             | 54             |
| 5            | 73             | 85             | 68             | 94             | 86             | 79             | 98             | 89             | 81             | 89             | 82             | 70             | 65             | 70             |
| 6            | 70             | 68             | 84             | 67             | 90             | 84             | 80             | 89             | 86             | 76             | 93             | 91             | 66             | 68             |
| 7            | 75             | 69             | 67             | 80             | 70             | 81             | 86             | 73             | 75             | 94             | 75             | 92             | 73             | 63             |
| 8            | 76             | 81             | 83             | 76             | 77             | 67             | 77             | 92             | 88             | 76             | 90             | 76             | 84             | 76             |
| 9            | 63             | 58             | 75             | 77             | 71             | 73             | 66             | 74             | 77             | 80             | 97             | 85             | 71             | 86             |
| 10           | 71             | 61             | 52             | 79             | 69             | 74             | 70             | 72             | 69             | 74             | 68             | 88             | 73             | 69             |
| 11           | 57             | 64             | 65             | 52             | 66             | 54             | 65             | 62             | 60             | 61             | 64             | 64             | 80             | 77             |
| 12           | 54             | 53             | 60             | 55             | 53             | 71             | 57             | 71             | 66             | 64             | 64             | 69             | 66             | 78             |
| K-6 ungd     | 14             | 15             | 18             | 17             | 24             | 16             | 20             | 15             | 12             | 21             | 15             | 21             | 21             | 19             |
| 7-12 ungd    | 23             | 43             | 25             | 16             | 30             | 29             | 31             | 24             | 12             | 0              | 3              | 0              | 28             | 11             |
| <b>TOTAL</b> | <b>1001</b>    | <b>1032</b>    | <b>1062</b>    | <b>1083</b>    | <b>1118</b>    | <b>1060</b>    | <b>1077</b>    | <b>1048</b>    | <b>978</b>     | <b>983</b>     | <b>971</b>     | <b>989</b>     | <b>933</b>     | <b>905</b>     |

Source: Genesee/Finger Lakes Regional Planning Council

Subsequent tables do not include the “ungraded” category, as that was eliminated from SED record keeping. These students are integrated with their grade level. For some years, the study team had to distribute these students evenly among grades as specific data was not available.



Table 2 indicates enrollment patterns from 2004-05 and includes survival rates from each year. The survival rate is a simple calculation of the percentage of students in one grade level going on to the next level in any given year. The average cohort survival rate (CSR) is used to project enrollment into the future. The assumptions of CSR is that patterns of grade-to-grade enrollment survivals over a five-year period will continue, unless some external factor influences those patterns. There are many patterns within any given community that impact CSR. For example, in some communities there is a local parochial school that services students grades K-8, but there is no local access to a parochial high school. Those communities may see a small positive impact on the CSR going from grades 8-9. The opposite also occurs in communities where local public elementary schools are perceived as strong, but secondary schools are a concern. These communities often see migration away from public schools after grade 6. The two dramatic patterns at WCCSD are grades 2-3 which suggests a survival rate of only 92.5% and grades 10-11 which suggests a survival rate of 89.48%. It is beyond the scope of this project to investigate the causes of these low survival rates. With the absence of extensive choice for WCCSD parents at the primary level, the drop off from grades 2-3 may well be a function of housing. As children age and families grow, parents look for housing options. There are limited housing options in the WCCSD. The high school reduction could be a combination of drop-outs and private school choice. In an interview with WCCSD Superintendent Thomas Gallagher, however, he indicated when one includes students obtaining a GED or other alternative diploma, there was not a single WCCSD student chose to completely “drop-out” of school last year. Such alternative diploma students, however, are not included in enrollment counts.

These recent enrollment declines were predictable in an analysis of the 2000 census data. At that time children aged 5-9 averaged in excess of 5% at each age interval of the total population of people under the age of 20 living in the Wheatland-Chili District. Children aged between 10 and 13 averaged in excess of 6% of the total at each age interval with a high of 7.8% for 12 year olds and a low of 4.5% for 11 year olds. Yet children aged 1-4 averaged exactly 4% at each age interval with a low of 3.6% for three year olds. Of significant concern is the precipitant drop in enrollment from 2007-2008 to 2008-2009. October 1, 2008 enrollment was 739, a loss of 47 pupils from 2007-2008.

From the data in *Table 2* we calculate a five-year cohort survival rate (CSR) and apply it to WCCSD as indicated in subsequent tables. CSR allows us to make projections of future enrolment. These tables are based on the October 1st enrollment figures. Again, as with all projections in this study, enrollment is necessarily speculative. CSR assumes a continuation of patterns previously established.

The final column in *Table 2* reflects the results of the census the district completed in November of 2008 for Grades K-8. We present these data in this format to illustrate how closely aligned they are with actual district enrollment. The 2008 Census had a return rate of 48.6%. In addition, there are a number of non-public school students living in the district. Despite the impact of these two factors, there is a remarkable degree of alignment between the census and actual enrollment.

Of course the most difficult projections involve those students not yet enrolled in school. Our initial assessment was made without the benefit of the District census, and so we made an estimate based on past kindergarten class size (50). Those projections are presented in *Table 3a*. Our second projection, *Table 3b*, reflects census numbers plus 30%, while *Table 3c* represents the census plus 10%. The final presentation (*Table 3d*) uses New York State Department of Health Live Birth data to project kindergarten enrollment. One might assume that this reflects the best estimate as it is parent reported data at birth. We are a bit skeptical. There is a fair amount of transiency in families with children between birth and kindergarten, especially when those families are renters.

**Table 2 – Five-Year Cohort Survival Rates with Census**

| Grade | 2003-04 | 1yr SR   | 2004-05 | 1yr SR   | 2005-06 | 1yr SR   | 2006-07 | 1yr SR   | 2007-08 | 1 yr SR  | 2008-09 |
|-------|---------|----------|---------|----------|---------|----------|---------|----------|---------|----------|---------|
| K     | 51      | 1.098039 | 56      | 0.982143 | 55      | 0.963636 | 53      | 1        | 53      | 0.811321 | 43      |
| 1     | 68      | 1.196078 | 61      | 1.053571 | 59      | 1        | 55      | 0.962264 | 51      | 1.056604 | 56      |
| 2     | 55      | 0.970588 | 66      | 1.04918  | 64      | 0.898305 | 53      | 0.981818 | 54      | 0.901961 | 46      |
| 3     | 70      | 1.036364 | 57      | 0.969697 | 64      | 0.90625  | 58      | 0.924528 | 49      | 0.981481 | 53      |
| 4     | 58      | 0.857143 | 60      | 1        | 57      | 0.828125 | 53      | 1.137931 | 66      | 0.979592 | 48      |
| 5     | 75      | 1.034483 | 60      | 1.166667 | 70      | 0.947368 | 54      | 1.037736 | 55      | 0.969697 | 64      |
| 6     | 70      | 0.933333 | 70      | 0.95     | 57      | 0.971429 | 68      | 1.074074 | 58      | 1.054545 | 58      |
| 7     | 66      | 1        | 70      | 0.971429 | 68      | 1.017544 | 58      | 1.029412 | 70      | 1.068966 | 62      |
| 8     | 78      | 0.924242 | 61      | 0.985714 | 69      | 1        | 68      | 1.12069  | 65      | 0.828571 | 58      |
| 9     | 88      | 1.012821 | 79      | 1        | 61      | 1.101449 | 76      | 0.926471 | 63      | 0.923077 | 60      |
| 10    | 71      | 1        | 88      | 1        | 79      | 0.934426 | 57      | 0.828947 | 63      | 0.952381 | 60      |
| 11    | 77      | 0.929577 | 66      | 0.897727 | 79      | 0.886076 | 70      | 0.947368 | 54      | 0.920635 | 58      |
| 12    | 78      | 1.038961 | 80      | 0.878788 | 58      | 0.962025 | 76      | 0.971429 | 68      | 1        | 54      |
| BOCES | 16      |          | 16      |          | 18      |          | 19      |          | 20      |          | 21      |
| Total | 921     |          | 890     |          | 858     |          | 818     |          | 789     |          | 741     |

Source: WCCSD

**Table 3a – Wheatland-Chili Five-Year Enrollment Projections**

**Kindergarten estimated at 50**

| Grade | 5 year csr        | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 |
|-------|-------------------|---------|---------|---------|---------|---------|
| K     | 0.971028          | 50      | 50      | 50      | 50      | 50      |
| 1     | 1.053704          | 45      | 53      | 53      | 53      | 53      |
| 2     | 0.96933           | 54      | 44      | 51      | 51      | 51      |
| 3     | 0.975622          | 45      | 53      | 43      | 50      | 50      |
| 4     | 0.970948          | 51      | 44      | 51      | 42      | 48      |
| 5     | 1.046516          | 50      | 54      | 46      | 54      | 44      |
| 6     | 1.01001           | 65      | 51      | 54      | 46      | 54      |
| 7     | 1.023352          | 59      | 66      | 52      | 56      | 47      |
| 8     | 0.980646          | 61      | 58      | 65      | 51      | 55      |
| 9     | 0.998094          | 58      | 61      | 58      | 65      | 51      |
| 10    | 0.947802          | 57      | 55      | 58      | 55      | 61      |
| 11    | 0.921666          | 55      | 52      | 51      | 53      | 51      |
| 12    | 0.970241          | 56      | 54      | 51      | 49      | 51      |
|       | BOCES             | 22      | 22      | 22      | 22      | 22      |
|       | Total enrollment. | 729     | 716     | 704     | 696     | 688     |

We see an estimate of 50 for kindergarten enrollment as reasonable. We derive this number not from hard data, but from past trends. Wheatland-Chili may have a low percentage of households with school aged children, but we suspect that as people age out of their homes, they will be repopulated by families with children. Of course, Monroe County is not a growth area, and so a conservative estimate, which we believe would be 50, seems to make sense. However, using trends to predict kindergarten enrollment does not acknowledge the hard data available through both the school census and the NYS Department of Health.

*Analysis with Current Census Data:* We urge caution in using census data. The census was very reliable in identifying existing students. In fact, as of October 1, 2008, the district had identified a total of 782 school age students, including students educated in district buildings, students educated out of district in special education programs, students attending non-public schools and students educated at home. Remarkably the census identified 795 such students or 13 additional school aged students. That is remarkable because the district only achieved a return rate of 48.6% on the census. Obviously, the district knew where at least 782 of those students resided and was able to achieve a high rate of return from known students. However,

the fact that 51.4% of citizens did not return their census information, suggests that it is possible that there are some students who were missed. Also notable is the presence in the school enrollment of non-resident students including those who participate in the Urban-Suburban program. Thus, although the census seems to align with actual enrollment, further analysis would be required to determine if there are gaps or overlaps.

Of greater interest to this work is the pre kindergarten population. This is a different population, much more difficult to identify than existing enrolled students. The census was conducted by mail. One of the reasons that the return rate was only 48.6%, one can surmise, is that people without children in school are less likely to open a letter from the school district. People with school aged children, again an assumption, are more likely to open mail from the school. So despite the efficacy of the census in finding school aged children, it may be less effective in finding non-school aged children, especially if there are no other children in the family attending school. We therefore, urge decision makers to treat the following with caution. However, if the census is correct and complete, we can expect the next five kindergarten classes to be **32, 24, 35, 27 and 22**. The final number (22) does not reflect a full year of data, and so we add a factor of .3 to reflect a full year. We are reasonably certain the census has not found all of the pre-school children in the district. *Table 3b* uses census numbers plus 30% to project kindergarten enrollment for each year of our projection. We chose 30% to reflect two assumptions. First, 51.4% of district residents did not return the census. It is reasonable to assume that some of those residents are parents with pre-school children. Second, it is not reasonable to assume that the same number of pre-school children identified in the 48.6% of respondents could also be found in the 51.4% of non-respondents. We assume that people without children are much more likely to respond to requests from the school than people with children, and thus the census did not find all the pre-school children. As we admit that the choice of 30% is arbitrary, we also offer an analysis using 10%. Finally we offer the best case scenario, which is using live birth rates.

**Table 3b – Wheatland-Chili Five-Year Enrollment Projections**

**Kindergarten using Census + 30%**

| Grade | 5 year csr        | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 |
|-------|-------------------|---------|---------|---------|---------|---------|
| K     | 0.971028          | 42      | 31      | 46      | 35      | 37      |
| 1     | 1.053704          | 45      | 44      | 33      | 48      | 37      |
| 2     | 0.96933           | 54      | 44      | 42      | 32      | 46      |
| 3     | 0.975622          | 45      | 53      | 43      | 41      | 31      |
| 4     | 0.970948          | 51      | 44      | 51      | 42      | 40      |
| 5     | 1.046516          | 50      | 54      | 46      | 54      | 44      |
| 6     | 1.01001           | 65      | 51      | 54      | 46      | 54      |
| 7     | 1.023352          | 59      | 66      | 52      | 56      | 47      |
| 8     | 0.980646          | 61      | 58      | 65      | 51      | 55      |
| 9     | 0.998094          | 58      | 61      | 58      | 65      | 51      |
| 10    | 0.947802          | 57      | 55      | 58      | 55      | 61      |
| 11    | 0.921666          | 55      | 52      | 51      | 53      | 51      |
| 12    | 0.970241          | 56      | 54      | 51      | 49      | 51      |
|       | BOCES             | 22      | 22      | 22      | 22      | 22      |
|       | Total enrollment. | 721     | 688     | 671     | 648     | 628     |

Using district census data plus 30% suggests that the district will continue to lose students until the total public school population is less than 628 students. It should be noted that about 7% of district students attend non-public schools. If that trend continues, and 7% of the census students attend non-public schools, the district will see enrollment closer to 615 by 2013.

Of course, there is reason to believe that a 30% escalator inflates the projections. After all, almost all of the current students were identified by the census. Of the 51.4% who did not respond, at best, only about 15% have children in their homes under the age of 18, if they represent the same proportion of the general population trends identified in the 2000 census. Of that group, even a smaller percentage would have pre-school children, again based on census data. *Table 3c* therefore, presents projections using a 10% escalator rather than 30%, to give decision makers a more conservative, and some would say more realistic view of future enrollments.

**Table 3c – Wheatland-Chili Five-Year Enrollment Projections**

**Kindergarten using Census + 10%**

| Grade | 5 year csr        | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 |
|-------|-------------------|---------|---------|---------|---------|---------|
| K     | 0.971028          | 35      | 26      | 39      | 30      | 31      |
| 1     | 1.053704          | 45      | 37      | 27      | 41      | 32      |
| 2     | 0.96933           | 54      | 44      | 36      | 27      | 40      |
| 3     | 0.975622          | 45      | 53      | 43      | 35      | 26      |
| 4     | 0.970948          | 51      | 44      | 51      | 42      | 34      |
| 5     | 1.046516          | 50      | 54      | 46      | 54      | 44      |
| 6     | 1.01001           | 65      | 51      | 54      | 46      | 54      |
| 7     | 1.023352          | 59      | 66      | 52      | 56      | 47      |
| 8     | 0.980646          | 61      | 58      | 65      | 51      | 55      |
| 9     | 0.998094          | 58      | 61      | 58      | 65      | 51      |
| 10    | 0.947802          | 57      | 55      | 58      | 55      | 61      |
| 11    | 0.921666          | 55      | 52      | 51      | 53      | 51      |
| 12    | 0.970241          | 56      | 54      | 51      | 49      | 51      |
|       | BOCES             | 22      | 22      | 22      | 22      | 22      |
|       | Total enrollment. | 714     | 676     | 652     | 625     | 599     |

Under this scenario, Wheatland-Chili ends up with 599 public school students by 2013. With the same proportion of new students attending non-public schools as currently exists, the district would have approximately 590 students in 2013.

*Table 3d* introduces a fourth approach to the projections. When a child is born, parents provide information for health and statistical purposes including the school district in which the family resides. The New York State Department of Health maintains those records. *Table 3d* projects kindergarten enrollment using Live Births among families in the Wheatland-Chili School District for 2004-2007. One might be tempted to assume this is the most accurate data available, as it reflects reported births to the State Health Department. However, as noted earlier, we are skeptical. Young families tend to be more transient. The pattern in Wheatland-Chili suggests such families are more likely to be leaving the district than moving into it.

**Table 3b – Wheatland-Chili Five-Year Enrollment Projections**

**Kindergarten Using Live Births**

| 5 year csr        | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 |
|-------------------|---------|---------|---------|---------|---------|
| 0.971028          | 66      | 47      | 46      | 78      | 60      |
| 1.053704          | 45      | 70      | 50      | 48      | 82      |
| 0.96933           | 54      | 44      | 67      | 48      | 47      |
| 0.975622          | 45      | 53      | 43      | 66      | 47      |
| 0.970948          | 51      | 44      | 51      | 42      | 64      |
| 1.046516          | 50      | 54      | 46      | 54      | 44      |
| 1.01001           | 65      | 51      | 54      | 46      | 54      |
| 1.023352          | 59      | 66      | 52      | 56      | 47      |
| 0.980646          | 61      | 58      | 65      | 51      | 55      |
| 0.998094          | 58      | 61      | 58      | 65      | 51      |
| 0.947802          | 57      | 55      | 58      | 55      | 61      |
| 0.921666          | 55      | 52      | 51      | 53      | 51      |
| 0.970241          | 56      | 54      | 51      | 49      | 51      |
| BOCES             | 22      | 22      | 22      | 22      | 22      |
| Total enrollment. | 745     | 730     | 713     | 732     | 736     |

LB Source: NYS Dept of Health retrieved from [http://www.health.state.ny.us/nysdoh/vital\\_statistics/2006/table15a.htm](http://www.health.state.ny.us/nysdoh/vital_statistics/2006/table15a.htm)

The live birth data suggests that the district will enroll approximately 725 pupils, factoring those parents who choose to send their children to non-public schools. This is actually more students than the district enrolls as of January, 2009. Again, live births were used in part to project Wheatland-Chili kindergarten enrollment previously and fell short.

The very significant difference between the census data and live birth data creates a dilemma for decision makers. Regardless of which of the projections the district chooses to use, it is clear that Wheatland-Chili will be a district with between 600 and 736 pupils enrolled in its in district programs.

The question arises, why has the Wheatland-Chili Central School District seen such a sharp enrollment decline? When the reorganization study was completed with Rush-Henrietta in 1986, Wheatland-Chili had 954 students and Rush-Henrietta had 5,843. As of January 19, 2009, the Wheatland Central School District enrolled 704 students, but Rush-Henrietta enrolled almost 6,000 students, or about the same number that they had over 20 years ago. The answer to that question may well lie in the availability of housing in each of the districts. In the final



section of this report, we speculate as to the impact of development on the Wheatland-Chili Central School District.

**Table 4 – Rush-Henrietta /Wheatland-Chili Enrollment Comparison**

| Year       | Rush-Henrietta | Wheatland-Chili |
|------------|----------------|-----------------|
| 1986       | 5,843          | 954             |
| 2009       | 6,000 (approx) | 726             |
| Difference | +157 or 2.7%   | -228 23.9d%     |

#### **Section IV: Response to Question 1**

Can the Wheatland-Chili Central School District, with a student population of approximately 700, provide a comprehensive K-12 program in Monroe County over the next decade that is fiscally sustainable?

#### Methodology

The Wheatland-Chili Central School District asked the study team to gather programmatic and service data on (1) Local school districts sharing borders with Wheatland-Chili, and (2) Small districts of similar wealth that are identified as “high-performing” by the New York State Education Department. The inclusion criteria for similar, small, high-performing school districts are documented below. Local school districts sharing borders with Wheatland-Chili CSD include:

Rush-Henrietta Central School District  
Churchville-Chili Central School District  
Gates-Chili Central School District  
Caledonia-Mumford Central School District

The study team relied on several different data collection sources to gain information about Wheatland Chili Central School District, its local neighbors, and other small high-performing districts around the state. Similar small high-performing school districts include:

Lyndonville Central School District  
Naples Central School District  
Pavilion Central School District  
Sherman Central School District

### Survey/Interview

To solicit district administrative input for the study, a **Comprehensive Program Evaluation Survey** was developed by the program evaluator and is included in as an appendix in this report. The survey was piloted with two (2) local district administrators prior to its use with districts participating in the research study. Items for this survey were adapted from three (3) federally developed surveys from the National Center for Education Statistics. These surveys include the Schools and Staffing Survey (SASS) of 2007-08; National Education Longitudinal Study (NELS) of 1988; and the Education Longitudinal Study (ELS) of 2002. We asked the Superintendent or Assistant Superintendent for Instruction to complete the survey with input from principals or other administrators as needed. All participating districts returned this survey to the research team. After the survey was complete, the program evaluator conducted a short **follow-up interview** with each Superintendent/Assistant Superintendent to provide feedback on items that might be confusing to respondents or for them to offer additional input or information about their district.

### Document Review

The study team also gathered data from several other sources. District and community demographics and assessment data were provided from the New York State Education Department's Report Cards as well as the 2000 U.S. Census report.<sup>2</sup> Graduation rates and postgraduate intention data was gathered from Standard and Poor's School Data Direct Information System, which is culled from the State Education Data Center.<sup>3</sup> Information provided in the Monroe County School Boards Association's 2008 Facts & Figures Report was used to validate information gathered from the study team on local academic programs and services.<sup>4</sup> Finally, district websites were consulted for further verification of programs and district information.

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<sup>2</sup> See NY State Report Cards: (<https://www.nystart.gov/publicweb/>). Retrieved August 5, 2008.

<sup>3</sup> See Standard & Poor's "School Data Direct" website ([www.schooladatadirect.org](http://www.schooladatadirect.org)). Retrieved August 10, 2008.

<sup>4</sup> See Monroe County School Board Association, 2008 Facts and Figures, at <http://www.mcsba.org/facts2000.html>.

## **Inclusion Criteria for High-Performing Districts**

The New York State Education Department (NYSED), in accordance with NCLB requirements, has maintained an annual listing of “Higher Performing/Gap Closing” schools or districts (based on Section 100.2(p) of Commissioner’s Regulations) starting with the 2002-2003 school year.<sup>5</sup> The criteria for inclusion for schools or districts are as follows:

- Meet all applicable State standards in ELA and Math and also make Adequate Yearly Progress (AYP) in ELA and Math for two (2) consecutive years.
- Are accountable for at least 30 continuously enrolled students in at least two (2) racial ethnic groups or at least one (1) racial ethnic group and one (1) of the following groups: low-income, disabilities, or LEP.

Based on these criteria, it is possible for an individual school to qualify as high-performing, while the district itself does not qualify.<sup>6</sup> For the purposes of this research study, only higher-performing districts were identified and compared to the Wheatland-Chili School District. This means that ALL schools within the district must be identified as higher-performing by NYSED standards.

First, the study team sought districts identified by NYSED as being “Higher Performing” and to further screen for districts whose student enrollment was fewer than 1,000 students and with a combined wealth ratio (CWR) less than 1.00. CWR data is found in NYSED “Foundation Aid Output Reports” for those districts, but was only available starting with the 2007-2008 school year.<sup>7</sup> In simple terms, a lower CWR score indicates a lower-wealth school district. A CWR of one indicates an average wealth district.

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<sup>5</sup> See NYSED Higher Performing Schools/District Lists ([www.emsc.nysed.gov/irts/school-accountability/highperform/home.html](http://www.emsc.nysed.gov/irts/school-accountability/highperform/home.html)) for more information. Retrieved August 18, 2008. See also NYSED press release, May 15, 2008 ([www.emsc.nysed.gov/irts/press-release/20080515/HighPerformingGapClosing.html](http://www.emsc.nysed.gov/irts/press-release/20080515/HighPerformingGapClosing.html)). Retrieved August 18, 2008.

<sup>6</sup> Schools designated as “Rapidly Improving” on the NYSED website were not included in this study because they have been previously below state standards.

<sup>7</sup> See NYSED State Aid website for information on combined wealth ratio: (<http://stateaid.nysed.gov/>). Retrieved August 15, 2008.

The study team used data as current as possible given NYSED’s lag in reporting time. The most consistent and thorough data available was from the 2005-06 and 2006-2007 school years; thus, the selection of high-performing school districts is based on these two (2) academic years.

The selection process yielded four (4) high-performing districts with enrollment and CWR similar to that of Wheatland-Chili (n=802, CWR .799) for 2006-2007 (*See Table 5*).

Coincidentally, these four (4) districts are all located in Western New York, and in some cases are in neighboring counties.

**Table 5 - Comparable Higher-Performing Districts identified from 2006-2007 data (CWR <1.00)**

| <b>District</b> | <b>County</b> | <b>Enrollment<br/>(06-07)</b> | <b>CWR<br/>(07-08)</b> |
|-----------------|---------------|-------------------------------|------------------------|
| Lyndonville     | Orleans       | 776                           | .455                   |
| Naples          | Ontario       | 861                           | .755                   |
| Pavilion        | Genesee       | 870                           | .468                   |
| Sherman         | Chautauqua    | 503                           | .396                   |

After the small, low-wealth, higher-performing districts were determined, the study team wanted to know if Wheatland-Chili Schools or any of its neighboring local high schools were deemed higher-performing districts. (Please note that there has been a large increase in the number of “higher-performing” schools and districts between the 2004-2005 HP list and the 2006-2007 list, so it is likely that some of these schools would be on the list.) As seen in *Table 6*, all the high schools, including Wheatland-Chili, were deemed higher-performing in the 2006-07 academic year. Churchville-Chili High School has been labeled higher-performing for the past three (3) consecutive years, and Wheatland-Chili High School has also been indicated as a higher-performing school for the past two (2) consecutive school years (2005-2006 and 2006-2007).

**Table 6 - Higher-Performing Local High Schools<sup>8</sup>**

| <b>Local High School</b> | <b>2004-2005</b> | <b>2005-2006</b> | <b>2006-2007</b> |
|--------------------------|------------------|------------------|------------------|
| Churchville-Chili HS     | ✓                | ✓                | ✓                |
| Gates-Chili HS           |                  |                  | ✓                |
| Rush-Henrietta HS        |                  |                  | ✓                |
| Wheatland-Chili HS       |                  | ✓                | ✓                |

In answering Question 1, we first had to define what a “comprehensive K-12 program in Monroe County” looked like. As indicated in the program proposal, we proposed to do an analysis of the school program offered in the Wheatland-Chili Central School District (WCCSD) and compare it with program profiles found in other Monroe County districts contiguous to WCCSD. The study team prepared a comprehensive survey of program offerings in each of the districts contiguous to WCCSD. The study team attempted to interview school officials in each of the districts to ensure that the survey data was correct. The survey is included as an appendix.

Again, it needs to be emphasized that in ascertaining program offerings we do not necessarily ascertain program quality. The key terms in Question 1 are “comprehensive” and “Monroe County.” Comprehensive speaks to breadth. Monroe County speaks to context. What is comprehensive in Monroe County might well be overwhelming to schools in remote rural areas and a basic program to some schools in Nassau County.

**Demographics**

*Table 7* introduces the districts and provides basic demographic data for each. We choose to include Caledonia-Mumford in this section of our analysis as it is a potential tuition partner and

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<sup>8</sup> Since the 2004-05 academic year when 79 school districts were determined to be “higher-performing” school districts, there has been a dramatic increase in higher-performing schools and districts. Currently almost one-third of the state’s districts (NYSED) and schools (NYSED) fall under the category of Higher Performing. However, the measures utilized by the state do not allow for any other assessment of performance that could deem a district outstanding in relation to others. Thus, finding the “best of the best” is not entirely possible given NYSED’s existing measures, and this presents a limitation to the study design.

program offerings are part of that analysis. What strikes us in looking at district demographics is the similarities found in all five (5) districts. Each of the districts has a large white majority ranging from 95% in Caledonia-Mumford to 73% in Rush-Henrietta. Wheatland-Chili has an 87% white majority. African Americans make up the largest minority population in each district with nearly identical numbers in Rush-Henrietta and Gates-Chili of 15% and 14% to 3% in Caledonia-Mumford. African Americans make up 9% of the student enrollment in Wheatland-Chili and 7% in Churchville-Chili.<sup>9</sup>

**Table 7 - District and Community Demographics (2006-07)**

|                                    | <b>Churchville-Chili</b> | <b>Gates-Chili</b>   | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b>           | <b>Caledonia-Mumford</b> |
|------------------------------------|--------------------------|----------------------|-----------------------|------------------------------------|--------------------------|
| <b>District Demographics</b>       |                          |                      |                       |                                    |                          |
| District BOCES                     | Monroe #2<br>Orleans     | Monroe #2<br>Orleans | Monroe #1             | Genesee-Livingston-Steuben-Wyoming | Monroe #2                |
| Higher Performing district (NYSED) |                          |                      |                       | X                                  |                          |
| Total district enrollment (06-07)  | 4,437                    | 5,019                | 5,735                 | 1,100                              | 802                      |
| American-Indian/Alaskan Native     | 8 (0%)                   | 9 (0%)               | 39 (1%)               | 1 (0%)                             | 2 (0%)                   |
| Black or African American          | 291 (7%)                 | 726 (14%)            | 848 (15%)             | 38 (3%)                            | 75 (9%)                  |
| Hispanic or Latino                 | 96 (2%)                  | 233 (5%)             | 228 (4%)              | 7 (1%)                             | 18 (2%)                  |
| Asian/Hawaiian/Pacific Islander    | 94 (2%)                  | 178 (4%)             | 440 (8%)              | 11 (1%)                            | 8 (1%)                   |
| White                              | 3,936 (89%)              | 3,873 (81%)          | 4,180 (73%)           | 1,043 (87%)                        | 699 (95%)                |
| Multiracial                        | 12 (0%)                  | N/A                  | 0 (0%)                | 0 (0%)                             | 0 (0%)                   |
| Free/Reduced Lunch                 | 13%/8%                   | 17%/9%               | 16%/9%                | 15%/7%                             | 25%/9%                   |
| Limited English Proficient (%)     | 1%                       | 1%                   | 4%                    | 0%                                 | 1%                       |
| Attendance Rate (%)                | 96                       | 97                   | 96                    | 96                                 | 96                       |
| Median # years teacher experience  | 3.5                      | 11.6                 | 5                     | NA                                 | 9                        |
| <b>Community Demographics</b>      |                          |                      |                       |                                    |                          |
| Population                         | 25,729                   | 34,560               | 48,435                | 5,952                              | 6,144                    |
| # of Households                    | 9,300                    | 13,622               | 16,432                | 2,129                              | 2,468                    |
| Combined Wealth Ratio (CWR)        | 0.577                    | 0.647                | 0.904                 | 0.538                              | 0.799                    |
| Single-parent households (%)       | 10.0                     | 9.7                  | 8.1                   | 10.0                               | 12.5                     |
| Household income <\$15,000 (%)     | 5.8                      | 9.0                  | 9.0                   | 5.2                                | 7.6                      |
| Household income \$15-29,999(%)    | 11.6                     | 13.8                 | 13.3                  | 17.7                               | 13.7                     |
| Household income \$30-49,999 (%)   | 20.3                     | 21.6                 | 19.9                  | 22.7                               | 21.8                     |
| Household income \$50-74,999 (%)   | 22.5                     | 23.6                 | 24.2                  | 24.7                               | 22.1                     |
| Household income \$75-99,999 (%)   | 18.5                     | 16.4                 | 15.5                  | 14.6                               | 15.1                     |
| Household income \$100-149,999 (%) | 15.8                     | 11.5                 | 14.0                  | 11.9                               | 14.5                     |
| Household income >\$150,000 (%)    | 5.4                      | 4.1                  | 4.1                   | 3.9                                | 5.3                      |
| Adults w/HS diploma (%)            | 93.2                     | 87.6                 | 92                    | 91.3                               | 92.2                     |
| Adults w/at least B.A. degree (%)  | 32.8                     | 22.8                 | 34.5                  | 19.7                               | 33.4                     |

Source: 2006-07 NY State Report Cards (<http://www.nystart.gov/publicweb/>).

<sup>9</sup> Note that students participating in the Urban-Suburban Interdistrict Transfer Program (USITP) are not included in these percentages.

The Latino population of each district is 5% or less with only 1% in Caledonia-Mumford. Wheatland-Chili has significantly more students eligible for Free Lunch (25%), which suggests more students from poor or working poor families. The other districts range from 13%-17%. However, neither household income nor Combined Wealth Ratio (CWR) suggests that Wheatland-Chili is the poorest district in the sample. Indeed, Wheatland-Chili has the second highest CWR (.799) behind only Rush-Henrietta (.904). CWR is a measure of district wealth which is calculated by the New York State Education Department. It combines “income per student” information from tax returns and “property wealth per student” from assessment data. However, it speaks to district wealth, not student wealth. The wealth *behind* each student in a given district may have little to do with the relative wealth *of* each student.

However, average family income should correlate well to the wealth *of* each student. Yet the census data does not align with the higher Free and Reduced Lunch Rate in Wheatland-Chili. In fact, Wheatland-Chili has the second lowest percentage of families with income below \$30,000. There are several possible explanations to that seemingly inconsistent pattern. The simplest is that in a small sample size [five (5) districts], such inconsistencies are bound to occur. The second is that perhaps Wheatland-Chili has been more successful identifying students eligible for the Free and Reduced Lunch program.

Regardless, we find the districts to be more similar than they are different with the major difference being size of enrollment. Rush-Henrietta and Gates-Chili have substantial borders with the Rochester City School District and are more first ring suburban in nature. Churchville-Chili is more rural, what many refer to as a second ring suburb. In terms of total square miles, Wheatland-Chili is larger than Gates-Chili, and only slightly smaller than Churchville-Chili. However, Wheatland-Chili has a more rural nature and feel than does Churchville-Chili. The southern portion of the district is very much like rural Livingston County, much more so than suburban Monroe County.



## Achievement Data

Given the difference in size, but the general similarity in demographics, we reviewed student performance data, specifically performance on state assessments. It was not within the scope of this study to provide a comprehensive analysis of student performance, and so we limited our inquiry to the most recent data for selected assessments. When compared with the potential merger and tuition partners (see Question 2), the performance of Wheatland-Chili students on state assessments was fairly similar. In some areas, WCCSD students perform better than the group, in other areas, not as well, and in other areas about the same. Again, this is not presented as a comprehensive analysis, but only to indicate that current assessment data does not indicate a significant disparity among the sample districts in student performance with the possible exception of the relatively high performance of Caledonia-Mumford students on New York State Regents Examinations, and that is only for a single year of data. Only Caledonia-Mumford has a higher graduation rate than WCCSD (see Table 9 on next page).

**Table 8 - Assessment Data (2006-07)**

|  | Churchville-Chili | Gates-Chili | Rush-Henrietta | Caledonia-Mumford | Wheatland-Chili |
|--|-------------------|-------------|----------------|-------------------|-----------------|
| <b>Assessments (% passing)</b>                               |                   |             |                |                   |                 |
| <b><i>Elementary Level</i></b>                               |                   |             |                |                   |                 |
| ELA 4  | 84                | 78          | 76             | 78                | 87              |
| Math 4   | 88                | 88          | 88             | 88                | 78              |
| Science 4  | 94                | 96          | 94             | 96                | 96              |
|  |                   |             |                |                   |                 |
| <b><i>Middle School Level</i></b>                            |                   |             |                |                   |                 |
| ELA 8  | 67                | 68          | 66             | 71                | 63              |
| Math 8   | 83                | 73          | 57             | 73                | 60              |
| Science 8  | 89                | 89          | 79             | 89                | 86              |
|  |                   |             |                |                   |                 |
| <b><i>High School Level</i></b>                              |                   |             |                |                   |                 |
| Secondary Level English                                      | 84                | 82          | 85             | 95                | 84              |
| Secondary Level Math   | 87                | 83          | 87             | 99                | 83              |
|  |                   |             |                |                   |                 |
| <b><i>Regents Exams % (&gt;65/&gt;85) – All Students</i></b> |                   |             |                |                   |                 |
| Comprehensive English  | 93/34             | 84/29       | 91/49          | 99/46             | 87/48           |
| Math A   | 96/47             | 87/50       | 89/39          | 94.59             | 89/35           |
| Math B   | 74/18             | 88/41       | 71/22          | 90/34             | 85/30           |
| Global History & Geography                                   | 76/32             | 75/28       | 77/37          | 95/36             | 75/31           |
| US History and Government                                    | 92/51             | 89/54       | 94/67          | 94/56             | 92/69           |
| Living Environment   | 85/29             | 82/18       | 91/39          | 95/46             | 96/41           |
| Physical setting/Earth science                               | 81/34             | 82/34       | 79/25          | 72/21             | 74/25           |
| Physical setting/Chemistry                                   | 85/15             | 71/4        | 77/9           | 80/13             | 76/12           |
| Physical setting/Physics                                     | 91/50             | 91/38       | 75/17          | N/A               | 75/29           |

Source: 2006-07 NY State Report Cards (<http://www.nystart.gov/publicweb/>). Note that a score of 65 or above is a passing score. A score of 85 or above is deemed “passing with distinction.”

**Table 9 - Graduation Rates (2006-2007 data)**

|                                    | <b>Churchville-Chili</b> | <b>Gates-Chili</b> | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b> | <b>Wheatland-Chili</b> |
|------------------------------------|--------------------------|--------------------|-----------------------|--------------------------|------------------------|
| Graduation Rate – All students (%) | 91                       | 93                 | 84                    | 98                       | 95                     |

Source: Standard & Poor’s “School Data Direct” website ([www.schooladatadirect.org](http://www.schooladatadirect.org)) for 2006-07

We also wanted to know if there were differences in student aspirations among the five (5) districts. Based on an analysis of postgraduate intentions of the Class of 2006, Wheatland students had fairly similar plans to other students in the sample districts. What is notable is that WCCSD students had the lowest percentage of students planning on attending a 4-year college (33.3%). Caledonia-Mumford had the highest 4-year college intention (50.6%). Still, the WCCSD total college going rate of 84.1% was similar to the rest of the sample.

**Table 10 - Postgraduate Intentions (2006 data)**

|                                    | <b>Churchville-Chili</b> | <b>Gates-Chili</b> | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b> | <b>Wheatland-Chili</b> |
|------------------------------------|--------------------------|--------------------|-----------------------|--------------------------|------------------------|
| Planning to attend college (%)     | 78.0                     | 89.2               | 83.4                  | 84.3                     | 84.1                   |
| 2 year college (%)                 | 41.4                     | 44.4               | 44.8                  | 33.7                     | 50.8                   |
| 4 year college (%)                 | 36.6                     | 44.7               | 38.6                  | 50.6                     | 33.3                   |
| Postsecondary non-degree study (%) | 1.8                      | 1.1                | 1.9                   | 3.6                      | 3.2                    |
| Employment (%)                     | 12.4                     | 3.1                | 11.8                  | 7.2                      | 6.4                    |
| Military (%)                       | 2.4                      | 1.7                | 2.2                   | 2.4                      | 4.8                    |
| Other plans (%)                    | 1.5                      | 0.0                | 0.5                   | 2.4                      | 0.0                    |
| Unknown (%)                        | 3.9                      | 4.8                | 0.2                   | 0.0                      | 1.6                    |

Source: Standard & Poor’s “School Data Direct” website ([www.schooladatadirect.org](http://www.schooladatadirect.org)) for 2006-07

### **Comprehensive Nature of Programs**

The core of our analysis is the comprehensive nature of the programs offered in each of the districts. The fundamental question the District wants answered is whether it can offer a comprehensive program consistent with Monroe County expectations. We approach this problem from three (3) distinct views. First, we analyze the program offered to elementary students in each of the sample districts. We then analyze the program offered to middle school

students in each of the sample districts. We conclude with an analysis of the program offered to high school students in each of the sample districts.<sup>10</sup>

How do program offerings in Wheatland-Chili compare with contiguous Monroe County suburban districts at the elementary (K-5) level?

*Table 11* suggests that there is no significant difference in the programs offered to elementary pupils at Wheatland-Chili when compared to contiguous districts. Indeed, WCCSD has the lowest class sizes of the comparison group, which should allow for more effective differentiation and thus a highly enriched program for advanced pupils. We are not suggesting that we have evidence this occurs, only that the small class size found in WCCSD puts them in a unique position to meet the needs of their elementary population. Two (2) of the districts do not offer full-day kindergarten. WCCSD does.

WCCSD offers very competitive remedial programs and, in fact, a broader range of programs than some of the cohort group.

Only Churchville-Chili appears to have a comprehensive extra-curricular program for its elementary students. WCCSD offers its elementary students 9 extra-curricular options, and Caledonia-Mumford and Rush Henrietta offers five or fewer such options. Generally, public schools do not offer extensive extra-curricular programs until middle school.

Assuming that WCCSD merged with any of the contiguous Monroe County school districts, program enhancements may be possible at the elementary level, but that would depend on how the increased aid was used. However, a merger with any of these districts could also mean a leveling of class size, which for WCCSD, could be an increase. In addition, it could mean a change in kindergarten. A full study on merger specifics with a given school would provide a comprehensive analysis of these issues.

**Table 11 - Elementary Level Academic Programs**

|  | <b>Churchville-Chili</b> | <b>Gates-Chili</b> | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b> | <b>Wheatland-Chili</b> |
|--|--------------------------|--------------------|-----------------------|--------------------------|------------------------|
| <b>Additional Academic Programs</b>                            |                          |                    |                       |                          |                        |
| Kindergarten   | X                        | X                  | X                     | X                        | X                      |
| Full-day Kindergarten  | X                        |                    |                       | X                        | X                      |
| Avg. Class size  | 20                       | 22                 | 16                    | 19                       | 15                     |
| Gifted and Talented/Enrichment                                 | YES                      | YES                | (embedded)            | YES                      | YES                    |
| Gifted and talented in school or outside/at another school     | In school                | In school          |                       | In school                | In school              |
| G&T students taken from their regular classes                  |                          |                    |                       | X                        |                        |
| <b>Elementary Remedial activities</b>                          |                          |                    |                       |                          |                        |
| Pull-out program in reading or English                         | X                        | X                  | X                     | X                        | X                      |
| Pull-out program in math                                       | X                        | X                  | X                     | X                        | X                      |
| Adult tutors work 1:1 with students in reading or English      | X                        |                    | X                     |                          | X                      |
| Adult tutors work 1:1 with students in math                    | X                        |                    | X                     |                          | X                      |
| Peer-tutoring in any subject                                   |                          |                    | X                     |                          | X                      |
| Extra subject period instead of elective or exploratory course | X                        |                    |                       |                          | X                      |
| After-school or before-school classes or coaching classes      | X                        | X                  | X                     |                          | X                      |
| Extra work or homework from classroom teacher                  | X                        |                    | X                     | X                        | X                      |
| Saturday/school break classes                                  |                          |                    |                       |                          | X                      |
| Summer school  | X                        |                    | X                     | X                        |                        |
| Mentoring program  | X                        |                    | X                     |                          |                        |
| Other (describe):  |                          |                    |                       |                          | Extra Instruction      |
| Music instruction  |                          |                    | X                     |                          |                        |
| Elementary Band  |                          | X                  | X                     | X                        | X                      |
| Orchestra  |                          |                    | X                     |                          |                        |
| Elementary Chorus  | X                        | X                  | X                     | X                        | X                      |

Source: Comprehensive Program Evaluation Survey, 2008

**Table 12 - Elementary Level Extracurricular Activities, Sports and Student Services**

|                                     | <b>Churchville-Chili</b> | <b>Gates-Chili</b> | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b> | <b>Wheatland-Chili</b> |
|-------------------------------------|--------------------------|--------------------|-----------------------|--------------------------|------------------------|
| # Full-time counselors (Elementary) | 1                        | 0                  | 1*                    | 0                        | 1                      |
| Elementary load per counselor       | 1:300-340                | 0                  | 1:500                 | 1:400                    | 1:300                  |
| Math Olympics                       | X                        |                    |                       |                          | X                      |
| Art Club                            | X                        | X                  |                       |                          | X                      |
| Chess Club                          |                          | X                  | X                     | X                        |                        |
| Drama Club                          | X                        | X                  |                       |                          |                        |
| Environmental club                  |                          |                    |                       |                          | X                      |
| Fitness First                       |                          |                    |                       | X                        | X                      |
| Literary Club                       | X                        |                    |                       |                          |                        |
| Newspaper                           | X                        |                    |                       |                          |                        |
| Odyssey of the Mind                 | X                        |                    |                       | X                        | X                      |
| School Ambassadors                  |                          |                    |                       |                          | X                      |
| Science club                        | X                        |                    |                       |                          |                        |
| Service club                        | X                        | X                  |                       |                          |                        |
| Ski club                            | X                        |                    | X                     |                          |                        |
| Storytelling                        |                          |                    |                       | X                        | X                      |
| Student Council                     | X                        |                    | X                     | X                        | X                      |
| Talent Show                         | X                        |                    |                       |                          |                        |
| Yearbook                            | X                        |                    |                       | X                        | X                      |

\* Social worker

Source: Comprehensive Program Evaluation Survey, 2008

In the final analysis, **there is little to indicate that the program of instruction offered to elementary students in the Wheatland–Chili Central School District is in any significant way inferior to programs offered to elementary children in surrounding Monroe County suburban districts.**

An associated question pertains to Caledonia-Mumford. If for some reason Wheatland-Chili elementary students were to attend elementary school in the Caledonia-Mumford Central School District, would they receive an elementary program equal in quality as that found in Wheatland-Chili? The answer appears to be yes. There is no apparent significant difference between the elementary program offered in Caledonia-Mumford and that offered in Wheatland-Chili.

Next, we turn our attention to the middle school program offered in each of the districts. The middle school program of study in New York State is the most prescriptive aspect of public schooling in this state. There are few alternatives to state requirements. That is not to say there are no alternatives. Schools may offer accelerated courses beyond the state requirements or

multiple foreign languages. How enrichment is offered varies from school to school. When comparing Wheatland-Chili to its contiguous districts, there are few differences in the academic program. Both Gates-Chili and Rush-Henrietta offer four (4) language choices to their middle school students, while the other districts, including WCCSD, offer only two (2). However, there is no evidence that Wheatland-Chili, with substantially fewer middle school students than the other districts in the group, offers a diminished middle school program.

**Table 13 - Middle School Level Academic Programs**

|  | <b>Churchville-Chili</b> | <b>Gates-Chili</b> | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b> | <b>Wheatland-Chili</b> |
|--|--------------------------|--------------------|-----------------------|--------------------------|------------------------|
| <b>Other Academic Programs</b>                             |                          |                    |                       |                          |                        |
| #Languages offered to MS                                   | 2                        | 4                  | 4                     | 2                        | 2                      |
| French   | X                        | X                  | X                     | X                        | X                      |
| Spanish  | X                        | X                  | X                     | X                        | X                      |
| German   |                          |                    | X                     |                          |                        |
| Latin  |                          | X                  |                       |                          |                        |
| Italian  |                          | X                  |                       |                          |                        |
| ASL  |                          |                    | X                     |                          |                        |
| Gifted and Talented/Enrichment                             | YES                      | YES                | (embedded)            | NO                       | NO                     |
| Gifted and talented in school or outside/at another school | In School                | In School          |                       |                          | X                      |
| G&T students grouped together for all or most subjects     | X                        |                    |                       |                          |                        |

Source: Comprehensive Program Evaluation Survey, 2008

When we examine the extracurricular activities, athletic opportunities, and student services available to middle school students at Wheatland-Chili as compared to the other schools in the cohort, we see no substantial disadvantages for WCCSD students in terms of the number of choices offered to students. WCCSD students are offered a competitive number of extracurricular clubs and activities. WCCSD middle school students have 16 choices of clubs and activities. Rush-Henrietta students have 25. Gates-Chili students have 17 choices, and Caledonia-Mumford students have 14. Churchville-Chili students have 11.

However, middle school students at Wheatland-Chili have fewer sports activity options than their peers in the surrounding school districts. There are eight sports offered at the middle school, while the other districts offer 10 or 11 sports each.

**Table 14 - Middle School Level Extracurricular Activities, Sports and Student Services**

|   | <b>Churchville-Chili</b> | <b>Gates-Chili</b> | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b> | <b>Wheatland-Chili</b> |
|---|--------------------------|--------------------|-----------------------|--------------------------|------------------------|
| 4-H, Boys & Girls Clubs, or Boy Scouts/Girls Scouts   |                          |                    | X                     | X                        | X                      |
| Academic honor societies  |                          |                    | X                     | X                        | X                      |
| Band  |                          | X                  | X                     | X                        | X                      |
| Book club   |                          |                    | X                     | X                        |                        |
| Business or entrepreneurship club   |                          |                    | X                     |                          |                        |
| Career club   |                          |                    | X                     |                          |                        |
| Chess club  | X                        | X                  | X                     |                          |                        |
| Chorus or choir   |                          | X                  | X                     | X                        | X                      |
| Community service club  |                          | X                  | X                     | X                        | X                      |
| Computer clubs  |                          | X                  | X                     |                          |                        |
| Conservation, recycling, or environmental group such as the Sierra Club or Nature Conservancy |                          | X                  | X                     | X                        | X                      |
| Creative writing or literary magazine   | X                        | X                  | X                     | X                        | X                      |
| Drama club  | X                        | X                  | X                     |                          | X                      |
| Educational clubs (Odyssey of the Mind, etc)  | X                        |                    | X                     | X                        | X                      |
| Foreign language club   | X                        | X                  | X                     | X                        | X                      |
| Jazz Band   | X                        |                    |                       |                          | X                      |
| Orchestra   |                          |                    | X                     |                          |                        |
| Other subject matter clubs (art)  | X                        |                    | X                     |                          |                        |
| Science club  |                          | X                  | X                     | X                        | X                      |
| Science fair/Science Olympics   | X                        | X                  |                       |                          |                        |
| Student council   |                          | X                  | X                     | X                        | X                      |
| Student newspaper   | X                        | X                  | X                     |                          |                        |
| Student yearbook  | X                        | X                  | X                     | X                        | X                      |
| Theatre (e.g. school plays or musicals)   | X                        | X                  | X                     | X                        | X                      |
| Interscholastic sports  |                          | X                  | X                     | X                        | X                      |
| Intramural sports   |                          | X                  | X                     |                          | X                      |
| Vocational education clubs  |                          |                    | X                     |                          |                        |
| <b><i>Sports available for MS (Boys/Girls)</i></b>  |                          |                    |                       |                          |                        |
| Baseball/softball   | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Basketball  | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Cheerleading or dance   |                          |                    |                       | B/G                      | G                      |
| Football  | B/G                      | B                  | B                     | B                        |                        |
| Golf  |                          |                    |                       | B/G                      |                        |
| Gymnastics  | B/G                      | G                  | G                     |                          |                        |
| Soccer  | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Swimming  |                          | B/G                |                       |                          | B/G                    |
| Tennis  |                          |                    |                       | B/G                      | B/G                    |
| Track   | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Volleyball  | G                        | B/G                | B/G                   | G                        |                        |
| Wrestling   | B                        | B                  | B                     | B                        |                        |
| Cross country   | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Lacrosse  | B/G                      | B                  | B/G                   |                          |                        |
| Bowling   | B/G                      |                    |                       |                          |                        |
| <b><i>Support Services</i></b>  |                          |                    |                       |                          |                        |
| Alternative/Stay-in/Dropout Prevention programs for MS  | X                        | X                  |                       |                          | X                      |



|                                | Churchville-Chili | Gates-Chili | Rush-Henrietta | Caledonia-Mumford | Wheatland-Chili |
|--------------------------------|-------------------|-------------|----------------|-------------------|-----------------|
| After-school program for MS    |                   | X           |                |                   | X               |
| Block Scheduling               | X                 | X           | X              | X                 | X               |
| # of full time counselors (MS) | 3                 | 5           | 7              | 1                 | .5              |
| MS load per counselor          | 1 per grade       | 1:208       | 1:275          | 1:300             | 1:200           |
| Project Lead the Way           | X                 |             |                | X                 | X               |
| Urban-Suburban                 |                   |             |                |                   | X               |

Source: Comprehensive Program Evaluation Survey, 2008

The most significant disparities in academic program offered are at the high school level, especially in specialized courses. All public high schools in New York State are required to offer a core program. The opportunities that exist beyond the core program are often a challenge for smaller districts. For example, students at Wheatland-Chili High School may choose from five (5) different advanced placement courses. These courses can often lead to college credit for high school work. Highly rated undergraduate institutions place a high degree of importance on how many advanced courses a student has completed in high school. The *Newsweek* list of outstanding high schools is based entirely on the number of students completing Advanced Placement and International Baccalaureate classes. Churchville-Chili offers 18, Gates-Chili 15 and Rush-Henrietta 13. Caledonia-Mumford offers 15. **It is reasonable to assume that if Wheatland-Chili were to merge with any of its neighbors, or adopt a tuition program for its high school students, that WCCSD students would have substantially more choices in advanced-level courses.**

There are 17 different opportunities for WCCSD high school students to participate in clubs and other activities. Rush-Henrietta high school students have 24 such opportunities, while Gates-Chili students have 18 and Churchville-Chili students have 16 opportunities to participate in clubs and activities.

Clearly, high school students in the districts contiguous to Wheatland-Chili have more choices regarding athletics than do WCCSD students. However, and we want to stress that does not always mean that there are more opportunities to play a high school sport. For example, Wheatland-Chili has a boys and girls basketball programs. In some districts, any given year, up to 900 juniors and seniors might vie for ten (10) starting positions on the boys and girls varsity basketball teams. In Wheatland-Chili, with classes of 50-60, the chances of playing on

the varsity basketball team are much greater. In simple terms, whereas slightly over 1% of juniors and seniors in some larger districts might start on the varsity basketball team, 10% of the Wheatland-Chili juniors and seniors might start on the varsity basketball team. More choices do not necessarily always mean more opportunities. In other cases, however, the opposite is true. No Wheatland-Chili students will play football, for example. Whereas in larger districts, more sports choices, and in that sense more opportunities, can be offered.

**Table 15 - High School Level Academic Programs**

|  | <b>Churchville-Chili</b> | <b>Gates-Chili</b> | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b> | <b>Wheatland-Chili</b> |
|--|--------------------------|--------------------|-----------------------|--------------------------|------------------------|
| <b>Elective courses for HS</b>                             |                          |                    |                       |                          |                        |
| Art  | X                        | X                  | X                     | X                        | X                      |
| Business   | X                        | X                  | X                     | X                        | X                      |
| Family & Consumer Science                                  |                          | X                  | X                     |                          | X                      |
| Health   | X                        | X                  | X                     | X                        | X                      |
| Languages other than English                               | X                        | X                  | X                     | X                        | X                      |
| Music  | X                        | X                  | X                     | X                        | X                      |
| Technology   | X                        | X                  | X                     | X                        | X                      |
| SAT or ACT preparation                                     |                          |                    | X                     | X                        |                        |
| <b>Other Academic Programs</b>                             |                          |                    |                       |                          |                        |
| #AP courses for college credit                             | 18                       | 15                 | 13                    | 15                       | 6                      |
| AP English Lit & Composition                               | X                        | X                  | X                     | X                        | X                      |
| AP English Lang. & Comp.                                   | X                        | X                  | X                     | X                        |                        |
| AP American History  | X                        | X                  | X                     | X                        | X                      |
| AP World History   | X                        | X                  | X                     | X                        |                        |
| AP European History  | X                        |                    |                       |                          |                        |
| AP Economics   |                          | X                  | X                     | X                        |                        |
| AP Gov./Politics/US  | X                        | X                  | X                     |                          |                        |
| AP Studio Art/Drawing                                      | X                        |                    | X                     | X                        | X                      |
| AP Statistics  | X                        | X                  | X                     |                          |                        |
| AP Calculus AB   | X                        | X                  | X                     | X                        | X                      |
| AP Chemistry   | X                        | X                  | X                     |                          |                        |
| AP Biology   | X                        | X                  | X                     | X                        | X                      |
| AP Physics B   | X                        | X                  | X                     | X                        |                        |
| AP Psychology  | X                        | X                  |                       | X                        |                        |
| AP Art History   | X                        |                    | X                     |                          |                        |
| AP Music Theory  | X                        |                    |                       |                          | X                      |
| AP Foreign Language  | X                        | X                  |                       | X                        |                        |
| AP Environmental Science                                   | X                        | X                  |                       |                          |                        |
| AP Computer Science  | X                        | X                  |                       |                          |                        |
| AP Accounting  |                          |                    |                       | X                        |                        |
| AP Health  |                          |                    |                       | X                        |                        |
| #Languages offered to HS                                   | 2                        | 4                  | 4                     | 2                        | 2                      |
| French   | X                        | X                  | X                     | X                        | X                      |
| Spanish  | X                        | X                  | X                     | X                        | X                      |
| German   |                          |                    | X                     |                          |                        |
| Latin  |                          | X                  |                       |                          |                        |
| Italian  |                          | X                  |                       |                          |                        |
| ASL  |                          |                    | X                     |                          |                        |
| Gifted and Talented/Enrichment                             |                          |                    |                       |                          |                        |
| Gifted and talented in school or outside/at another school | NO                       | NO                 | (embedded)            | NO                       | X                      |

Source: Comprehensive Program Evaluation Survey, 2008

Interscholastic athletic opportunities also suggest fewer choices for WCCSD. Wheatland-Chili students have fewer choices than their counterparts in contiguous districts. There are eleven (11) athletic offerings to Wheatland-Chili students: seven (7) of which are available to boys and girls, one (1) to boys only and two (2) to girls only. Other districts provide sports offerings

numbering from 17 in Gates-Chili to 16 in Rush-Henrietta, 13 in Churchville-Chili and 12 in Caledonia-Mumford.

**Table 16 - High School Level Extracurricular Activities, Sports and Student Services**

|  | <b>Churchville-Chili</b> | <b>Gates-Chili</b> | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b> | <b>Wheatland-Chili</b> |
|--|--------------------------|--------------------|-----------------------|--------------------------|------------------------|
| 4-H, Boys & Girls Clubs, or Boy Scouts/Girls Scouts  |                          |                    | X                     | X                        | X                      |
| Academic honor societies   |                          | X                  | X                     | X                        | X                      |
| Band   |                          |                    | X                     | X                        | X                      |
| Book club  |                          |                    | X                     |                          |                        |
| Business or entrepreneurship club  |                          | X                  | X                     | X                        | X                      |
| Career club  |                          |                    | X                     |                          |                        |
| Chess club   | X                        | X                  | X                     |                          |                        |
| Chorus or choir  |                          |                    | X                     | X                        | X                      |
| Community service club   |                          | X                  | X                     | X                        | X                      |
| Computer clubs   | X                        |                    | X                     |                          |                        |
| Conservation, recycling, or environmental group such as the Sierra Club or Nature Conservancy                |                          | X                  |                       |                          |                        |
| Creative writing or literary magazine  |                          | X                  | X                     | X                        |                        |
| Debate or speech team  |                          |                    | X                     |                          |                        |
| Drama club   | X                        | X                  | X                     |                          |                        |
| Educational clubs (Odyssey of the Mind, etc)   |                          | X                  | X                     | X                        |                        |
| Foreign language club  | X                        | X                  | X                     | X                        | X                      |
| Future Educators Club  | X                        |                    |                       |                          | X                      |
| History club   |                          |                    | X                     |                          | X                      |
| Lifesmarts club  | X                        |                    |                       |                          |                        |
| Math club  | X                        | X                  | X                     |                          | X                      |
| Model UN club  | X                        | X                  | X                     |                          | X                      |
| Orchestra  |                          | X                  | X                     |                          |                        |
| Other subject matter clubs (art)   |                          | X                  | X                     |                          | X                      |
| Photography Club   |                          |                    |                       | X                        |                        |
| Political club   |                          |                    | X                     |                          |                        |
| Science club (Please specify if there is a specific focus such as astronomy, robotics, Project Lead the Way) | X<br>(Robotics)          |                    | X                     | X                        | X                      |
| Science fair/Science Olympics  | X                        | X                  |                       |                          |                        |
| Ski club   | X                        |                    | X                     | X                        | X                      |
| Student council  | X                        | X                  | X                     | X                        | X                      |
| Student newspaper  | X                        | X                  | X                     |                          | X                      |
| Student yearbook   | X                        |                    | X                     | X                        | X                      |
| Theatre (e.g. school plays or musicals)  | X                        | X                  | X                     | X                        | X                      |
| Religious organizations  | X                        |                    |                       |                          |                        |
| Interscholastic sports   |                          |                    | X                     | X                        | X                      |
| Intramural sports  |                          | X                  | X                     |                          | X                      |
| Vocational education clubs   |                          |                    | X                     |                          |                        |
| <b><i>Sports available for HS (Boys/Girls)</i></b>   |                          |                    |                       |                          |                        |
| Baseball/softball  | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Basketball   | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Cheerleading or dance  | B/G                      | G                  | B/G                   | B/G                      | G                      |

|  | <b>Churchville-Chili</b> | <b>Gates-Chili</b> | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b> | <b>Wheatland-Chili</b> |
|--|--------------------------|--------------------|-----------------------|--------------------------|------------------------|
| Field hockey   |                          |                    |                       | B                        |                        |
| Football   | B/G                      | B                  | B                     | B                        |                        |
| Golf   |                          |                    | B                     | B/G                      | B                      |
| Gymnastics   | B/G                      | G                  | G                     |                          |                        |
| Ice hockey   |                          | B                  | B                     |                          |                        |
| Soccer   | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Swimming   |                          | B/G                | B/G                   |                          | B/G                    |
| Tennis   | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Track  | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Volleyball   | G                        | B/G                | B/G                   | G                        | G                      |
| Wrestling  | B                        | B                  | B                     | B                        |                        |
| Cross country  | B/G                      | B/G                | B/G                   | B/G                      | B/G                    |
| Lacrosse   | B/G                      | B/G                | B/G                   |                          |                        |
| Ski/Snowboard  |                          | B                  |                       |                          |                        |
| Bowling  | B/G                      | G                  | B/G                   |                          |                        |
| Step   |                          | B                  |                       |                          |                        |
| <b>HS career/planning services</b>                                     |                          |                    |                       |                          |                        |
| Help with filling out college/vocational/technical school applications | X                        | X                  | X                     | X                        | X                      |
| Help with filling out financial aid forms                              | X                        | X                  |                       | X                        | X                      |
| Assistance in writing essays for college applications                  | X                        | X                  | X                     | X                        | X                      |
| Days off from school to visit college or vocational/technical schools  | X                        | X                  | X                     | X                        | X                      |
| Career placement counseling  | X                        | X                  | X                     | X                        | X                      |
| Practice interviews  | X                        | X                  | X                     | X                        | X                      |
| Other:   |                          |                    | X                     |                          | X                      |
| Dual credit for HS and College   | X                        | X                  | X                     | X                        | X                      |
| Alternative/Stay-in/Dropout Prevention programs for HS                 |                          | X                  | X                     | X                        | X                      |
| Regents Alternative Program  |                          |                    | X                     |                          |                        |
| Block Scheduling   | X                        |                    | X                     | X                        | X                      |
| Career & Technical courses   | X                        | X                  | X                     | X                        | X                      |
| Specialized Career Academy   |                          |                    |                       |                          |                        |
| Work-based internships   | X                        | X                  | X                     | X                        | X                      |
| New Visions Program  | X                        | X                  |                       | X                        |                        |
| GED Program  |                          |                    |                       | X                        | X                      |
| # of full time counselors (HS)   | 4                        | 8                  | 8                     | 1                        | 1                      |
| HS load per counselor  | 1 per grade              | 1:208              | 1:250                 | 1:300                    | 1:227                  |
| Transition services  | X                        |                    | X                     | X                        | X                      |
| Career pathways  |                          | X                  |                       |                          |                        |
| Continuing Education   |                          | X                  |                       | X                        |                        |
| Project "Lead the Way"   | X                        |                    |                       | X                        | X                      |

Source: Comprehensive Program Evaluation Survey, 2008

We also examined district-wide programs and services offered to students in each of the districts in the comparison group. This is an area where district size seems not to impact the

breadth of offerings and initiatives. A review of the programs and options offered at Wheatland-Chili suggests that there are not substantial differences in the opportunities available to Wheatland students and community members as compared to the other districts in the comparison group.

It should also be noted that the entire group appears to be closely attuned to the needs of their communities.

**Table 17 - Districtwide Programs and Services**

|   | <b>Churchville-Chili</b> | <b>Gates-Chili</b> | <b>Rush-Henrietta</b> | <b>Caledonia-Mumford</b> | <b>Wheatland-Chili</b> |
|---|--------------------------|--------------------|-----------------------|--------------------------|------------------------|
| Universal Pre-Kindergarten  |                          |                    | X                     | X                        |                        |
| Student Support Team  | X                        |                    |                       | X                        | X                      |
| Before or After-school day care   | X                        |                    | X                     |                          | X                      |
| Career-planning services  |                          |                    | X                     |                          | X                      |
| State certified library media specialists   | X                        | X                  | X                     | X                        | X                      |
| Partnership with outside organizations (e.g., businesses) to provide services to students | YMCA, Leo Clubs          | X (ADEPT)          |                       | X                        | X                      |
| Health and Safety coordinator   | X                        | X                  | X                     | X                        | X                      |
| FT Nurse  | X                        | X                  | X                     | X                        | X                      |
| HIV, STD, or teen pregnancy prevention  | X                        | X                  | X                     | X                        | X                      |
| Tobacco-use prevention  | X                        | X                  | X                     | X                        | X                      |
| Physical activity   | X                        | X                  | X                     | X                        | X                      |
| Nutrition and healthy eating  | X                        | X                  | X                     | X                        | X                      |
| Character education (Programs for social, emotional, & ethical dev.                       | X                        | X                  | X                     | X                        | X                      |
| Bullying and/or violence prevention   | X                        | X                  | X                     | X                        | X                      |
| Tobacco use prevention  | X                        | X                  | X                     | X                        | X                      |
| Alcohol use prevention  | X                        | X                  | X                     | X                        | X                      |
| Drug prevention   | X                        | X                  | X                     | X                        | X                      |
| Block scheduling  |                          |                    | X                     |                          | X                      |
| Foreign language begins grade   | 7                        |                    | 6                     | 7                        | 7                      |
| 6-1-1 option for special ed   | X                        |                    |                       | X                        | X                      |
| 12-1-1 option for special ed  | X                        | X                  | X                     | X                        | X                      |
| English Language Proficiency requirement for LEP students                                 |                          | X                  | X                     | X                        | X                      |
| Regular English language assessments at least once/year for LEP students                  |                          | X                  | X                     | X                        | X                      |
| Grades subdivided into teams/houses/family groupings                                      | X (MS)                   | X (MS)             | X                     |                          | X                      |
| Programs with special instructional approaches (i.e., Montessori)                         | X                        |                    |                       |                          | X                      |
| Grade students can start music instruments  | 4                        | 3                  | 4/5                   | 4                        | 5                      |
| Distance Learning   |                          |                    |                       |                          | X                      |
| In-school suspension programs   |                          |                    | X                     |                          | X                      |
| Extended day program for students needing assistance                                      | X                        | X                  | X                     |                          | X                      |
| Summer school for students needing assistance   | X                        | X                  | X                     | X                        | X                      |
| Looping   |                          | X                  | X                     |                          | X                      |
| Co-Teaching   |                          | X                  |                       | X                        | X                      |
| Resource Room Support   | X                        | X                  | X                     | X                        | X                      |
| Career Center (Monroe BOCES)  |                          |                    | X                     |                          |                        |
| World of Work (Monroe BOCES)  |                          |                    | X                     |                          | X                      |
| Career Cruising   | X                        |                    |                       |                          | X                      |
| Continuing Education  |                          | X                  |                       |                          | X                      |

Source: Comprehensive Program Evaluation Survey, 2008

The second part of this research question concerns whether or not there are districts of similar size and socio-economic background that are distinguished by their students' performance. As noted in the methodology section of this report, the study team identified only four (4) districts in the state that met the criteria of high performing, low wealth, and low enrollment. These districts include Lyndonville, Pavilion, Naples, and Sherman. All four (4) are in the Western portion of the state.

In a review of demographic comparisons, there are both similarities and differences among the four (4) schools and Wheatland-Chili. All of the districts have Free and Reduced Lunch percentages in excess of 20%. In fact, Sherman Central School has a total Free and Reduced Lunch rate of 51%. In terms of enrollment, Pavilion and Naples are slightly larger than Wheatland-Chili, Lyndonville is slightly smaller, and Sherman is significantly smaller than the rest of the group at 503 students.

Sherman is both the most rural of the group and the least wealthy. It is closer to Erie, Pa. (28 miles) than any large New York urban center. Buffalo is 77 miles from Sherman. Sherman is in Chautauqua County, one of the most rural counties in New York. Lyndonville is located midway between Rochester and Buffalo in Orleans County. Pavilion is very close to Wheatland-Chili and Monroe County, and Naples is approximately 50 miles from Rochester.

Wheatland-Chili appears to be the wealthiest of the five (5) districts with a CWR of .799, while Naples is close behind with a CWR of .755. Much of the property wealth in Naples is drawn from properties on Canandaigua Lake, many of which are seasonal, and thus do not send students to the school district. Lyndonville and Pavilion are close in wealth with CWRs of .455 and .468, respectively; while Sherman has the least wealthy with a CWR of .396. Also notable is the percentage of families with incomes under \$30,000. WCCSD and Pavilion both have about 21% of their families earning under \$30,000, while the other three (3) districts range from 30-35% of their families at the lower end of the income spectrum. WCCSD also has by far the highest number of residents with at least a bachelor's degree (33.4%). Sherman and Lyndonville have the lowest percentage, each about 14%.



**Table 18 - HP District and Community Demographics**

|                                    | Lyndonville | Naples    | Pavilion       | Sherman    | Wheatland-Chili   |
|------------------------------------|-------------|-----------|----------------|------------|-------------------|
| <b>District Demographics</b>       |             |           |                |            |                   |
| District BOCES                     | Orleans     | Ontario   | Genesee Valley | Chautauqua | Monroe #2 Orleans |
| Higher Performing district (NYSED) | X           | X         | X              | X          |                   |
| Total district enrollment          | 776         | 861       | 870            | 503        | 802               |
| American-Indian/Alaskan Native     | 8 (1%)      | 8 (1%)    | 2 (0%)         | 0 (0%)     | 2 (0%)            |
| Black or African American          | 15 (2%)     | 13 (2%)   | 22 (3%)        | 2 (0%)     | 75 (9%)           |
| Hispanic or Latino                 | 24 (3%)     | 11 (1%)   | 9 (1%)         | 7 (1%)     | 18 (2%)           |
| Asian/Hawaiian/Pacific Islander    | 3 (0%)      | 8 (1%)    | 1 (0%)         | 0 (0%)     | 8 (1%)            |
| White                              | 721 (93%)   | 821 (95%) | 829 (95%)      | 481 (98%)  | 699 (87%)         |
| Multiracial                        | 5 (1%)      | 0 (0%)    | 7 (1%)         | 0 (0%)     | 0 (0%)            |
| Free/Reduced Lunch                 | 24%/9%      | 20%/8%    | 20%/9%         | 28%/23%    | 25%/9%            |
| Limited English Proficient (%)     | 1%          | 0%        | 0%             | 0%         | 1%                |
| Attendance rate (%)                | 95          | 96        | 96             | 92         | 96                |
| <b>Community Demographics</b>      |             |           |                |            |                   |
| Population                         | 4,046       | 6,230     | 4,737          | 2,607      | 6,144             |
| # of Households                    | 1,426       | 2,364     | 1,632          | 918        | 2,468             |
| Combined Wealth Ratio (CWR)        | 0.455       | 0.755     | .468           | .396       | 0.799             |
| Single-parent households (%)       | 10.4        | 9.0       | 9.5            | 8.0        | 12.5              |
| Household income <\$15,000 (%)     | 11.8        | 12.1      | 5.4            | 12.4       | 7.6               |
| Household income \$15-29,999(%)    | 18.3        | 18.4      | 15.6           | 22.5       | 13.7              |
| Household income \$30-49,999 (%)   | 26.2        | 25.5      | 24.2           | 29.4       | 21.8              |
| Household income \$50-74,999 (%)   | 24.1        | 22.0      | 28.9           | 19.7       | 22.1              |
| Household income \$75-99,999 (%)   | 11.6        | 11.5      | 13.7           | 8.5        | 15.1              |
| Household income \$100-149,999 (%) | 7.0         | 7.3       | 9.6            | 5.6        | 14.5              |
| Household income >\$150,000 (%)    | 1.3         | 3.3       | 2.5            | 1.8        | 5.3               |
| Adults w/HS diploma (%)            | 84.9        | 86.8      | 88.5           | 82.5       | 92.2              |
| Adults w/at least B.A. degree (%)  | 14.2        | 24.0      | 16.8           | 14.0       | 33.4              |

Source: 2006-07 NY State Report Cards (<http://www.nystart.gov/publicweb/>).

The primary purpose of the study team in comparing Wheatland-Chili with the higher-performing districts was to look at the breadth and depth of program offerings. As such, we will limit our analysis to program offerings at each of the grade levels as well as district-wide programs and initiatives.

Again, we found that the Wheatland Chili School District offers a comparable set of programs and services to the other four higher-performing districts. A close study of Tables 19-23 shows that there is little dissimilarity among the districts. In fact, Wheatland-Chili appears to be very competitive with these other small districts.

**Table 19 - HP Elementary Level Academic Programs**

|  | Lyndonville           | Naples | Pavilion | Sherman | Wheatland<br>-Chili |
|--|-----------------------|--------|----------|---------|---------------------|
| <b>Additional Academic Programs</b>                                |                       |        |          |         |                     |
| Kindergarten   | X                     | X      | X        | X       | X                   |
| Full-day Kindergarten  | X                     | X      | X        | X       | X                   |
| Avg. Class size  | 21                    | 16     | 16       | 16      | 15                  |
| Gifted and Talented/Enrichment                                     | YES                   | YES    | YES      | NO      | NO                  |
| Gifted and talented in school or outside/at another school         | N/A                   | Inside | Inside   |         |                     |
| G&T students given enriched instruction in particular subjects     | X                     | X      |          |         |                     |
| G&T students given supplemental instruction in their own classroom | X                     |        | X        |         |                     |
| <b>Elementary Remedial activities</b>                              |                       |        |          |         |                     |
| Pull-out program in reading or English                             |                       | X      | X        | X       | X                   |
| Pull-out program in math   |                       | X      | X        | X       | X                   |
| Adult tutors work 1:1 with students in reading or English          |                       | X      |          |         | X                   |
| Adult tutors work 1:1 with students in math                        |                       | X      |          |         | X                   |
| Peer-tutoring in any subject                                       |                       | X      |          | X       |                     |
| Extra subject period instead of elective or exploratory course     |                       | X      |          | X       | X                   |
| After-school or before-school classes or coaching classes          | X                     | X      |          | X       | X                   |
| Extra work or homework from classroom teacher                      | X                     |        |          | X       | X                   |
| Saturday/School break classes                                      |                       |        |          |         | X                   |
| Summer school  | X                     | X      | X        | X       | X                   |
| Mentoring program  |                       |        |          | X       |                     |
| Other (describe):  | Academic Intervention |        |          |         | Extra Instruction   |
| Music instruction  |                       |        |          |         |                     |
| Elementary Band  | X                     | X      |          | X       | X                   |
| Orchestra  |                       |        |          |         |                     |
| Elementary Chorus  | X                     | X      | X        | X       | X                   |

Source: Comprehensive Program Evaluation Survey, 2008

**Table 20 - HP Middle School Level Academic Programs**

|                                | Lyndonville | Naples | Pavilion | Sherman | Wheatland<br>-Chili |
|--------------------------------|-------------|--------|----------|---------|---------------------|
| <b>Other Academic Programs</b> |             |        |          |         |                     |
| #Languages offered to MS       | 1           | 2      | 1        | 1       | 2                   |
| French                         |             | X      |          |         | X                   |
| Spanish                        | X           | X      | X        | X       | X                   |
| Gifted and Talented/Enrichment | YES         | NO     | NO       | NO      | YES                 |

Source: Comprehensive Program Evaluation Survey, 2008

**Table 21 - HP Middle School Level Extracurricular Activities, Sports & Student Services**

|  | Lyndonville | Naples | Pavilion | Sherman         | Wheatland<br>-Chili |
|--|-------------|--------|----------|-----------------|---------------------|
| 4-H, Boys & Girls Clubs, or Boy Scouts/Girls Scouts                                    |             |        | X        | X (Girl Scouts) |                     |
| Academic honor societies   | X           |        |          | X               | X                   |
| Band   | X           | X      | X        | X               | X                   |
| Bicycling, rollerblading, or skateboarding   | X           |        |          |                 |                     |
| Book club  |             | X      | X        |                 |                     |
| Chorus or choir  | X           | X      | X        | X               | X                   |
| Community service club   | X           |        |          |                 | X                   |
| Computer Club  | X           |        |          |                 |                     |
| Conservation, recycling, or environmental group (e.g. Sierra Club/ Nature Conservancy) |             | X      |          |                 |                     |
| Creative writing or literary magazine  |             |        |          |                 | X                   |
| Debate or speech team  |             | X      |          |                 |                     |
| Drama club   | X           | X      | X        | X               | X                   |
| Educational clubs (Odyssey of the Mind, etc)   |             |        | X        |                 |                     |
| Foreign language club  |             | X      |          | X               | X                   |
| Future Farmers of America club   |             |        |          | X               |                     |
| Other subject matter clubs (art)   |             |        | X        | X               |                     |
| Photography Club   |             |        |          |                 |                     |
| Political club   |             |        |          |                 |                     |
| Science club   |             | X      |          |                 | X                   |
| Student council  | X           | X      | X        | X               | X                   |
| Student yearbook   |             | X      |          | X               |                     |
| Theatre (e.g. school plays or musicals)  | X           | X      | X        | X               |                     |
| Religious organizations  |             |        |          | X               |                     |
| Interscholastic sports   | X           | X      | X        | X               | X                   |
| Intramural sports  | X           | X      |          | X               |                     |
| <b>Sports available for MS (Boys/Girls)</b>  |             |        |          |                 |                     |
| Baseball/softball  | B/G         | B/G    | B/G      | G               | B/G                 |
| Basketball   | B/G         | B/G    | B/G      | B/G             | B/G                 |
| Cheerleading or dance  |             |        |          | G               | G                   |
| Football   |             |        |          | B               |                     |
| Golf   |             |        | B/G      | B/G             |                     |
| Soccer   | B/G         | B/G    | B/G      |                 | B/G                 |
| Swimming   |             | B/G    |          |                 | B/G                 |
| Tennis   |             | B/G    |          |                 | B/G                 |
| Track  | B/G         |        | B/G      | B/G             | B/G                 |
| Volleyball   | G           |        |          |                 | G                   |
| Wrestling  | B           |        | B/G      |                 |                     |
| Cross country  |             |        | B/G      | B/G             | B/G                 |
| Ski/Snowboard  |             | B/G    |          | B/G             |                     |
| <b>Support Services</b>  |             |        |          |                 |                     |
| Alternative/Stay-in/Dropout Prevention programs for MS                                 | X           | X      | X        | X               |                     |
| After-school program for MS  | X           |        | X        |                 |                     |
| Block Scheduling   | X           |        |          |                 | X                   |
| # of full time counselors (MS)   | 1           | 1.5    | 1        | .5              | .5                  |
| MS load per counselor  | 1:270       | 1:200  | 1:300    | 1:125           | 1:184               |

Source: Comprehensive Program Evaluation Survey, 2008

**Table 22 - HP High School Level Academic Programs**

|   | Lyndonville         | Naples | Pavilion | Sherman | Wheatland<br>-Chili |
|---|---------------------|--------|----------|---------|---------------------|
| <b>Elective courses for MS &amp; HS</b> |                     |        |          |         |                     |
| Art                                     | X                   | X      | X        | X       | X                   |
| Business                                | X                   | X      | X        | X       | X                   |
| Family & Consumer Science               |                     |        | X        | X       | X                   |
| Health                                  | X                   | X      | X        | X       | X                   |
| Languages other than English            | X                   | X      | X        | X       | X                   |
| Music                                   | X                   | X      | X        | X       | X                   |
| Technology                              | X                   | X      | X        | X       | X                   |
| SAT or ACT preparation                  |                     |        |          | X       |                     |
| <b>Other Academic Programs</b>          |                     |        |          |         |                     |
| #AP courses for college credit          | 5                   | 5      | 0**      | 6       | 6                   |
| AP English Lit & Composition            | X                   | X      |          | X       | X                   |
| AP English Lang. & Comp.                | X                   | X      |          | X       |                     |
| AP American History                     | X                   |        |          |         | X                   |
| AP World History                        | *                   | X      |          |         |                     |
| AP Economics                            | *                   |        |          |         |                     |
| AP Gov./Politics/US                     | *                   | X      |          |         |                     |
| AP Studio Art/Drawing                   |                     |        |          |         | X                   |
| AP Statistics                           | X                   |        |          | X       |                     |
| AP Calculus AB                          | X                   |        |          | X       | X                   |
| AP Chemistry                            | *                   |        |          | X       |                     |
| AP Biology                              |                     |        |          |         | X                   |
| AP Physics B                            |                     | X      |          |         |                     |
| AP Art History                          |                     |        |          |         |                     |
| AP Music Theory                         |                     |        |          |         | X                   |
| AP Other                                |                     |        |          | X       |                     |
| #Languages offered to HS                | 1                   | 2      | 1        | 1       | 2                   |
| French                                  |                     | X      |          |         | X                   |
| Spanish                                 | X                   | X      | X        | X       | X                   |
| Gifted and Talented/Enrichment          | YES<br>(enrichment) | NO     | NO       | NO      | NO                  |

Source: Comprehensive Program Evaluation Survey, 2008

\* Additional AP courses to be offered in 09-10 school year

\*\* Pavilion offers dual-credit bearing courses with Genesee Community College rather than AP courses.

**Table 23 - HP High School Level Extracurricular Activities, Sports and Student Services**

|  | Lyndonville | Naples | Pavilion | Sherman | Wheatland<br>-Chili |
|--|-------------|--------|----------|---------|---------------------|
| 4-H, Boys & Girls Clubs, or Boy Scouts/Girls Scouts  |             |        | X        | X (4H)  | X                   |
| Academic honor societies   | X           | X      | X        | X       | X                   |
| Band   | X           | X      | X        | X       | X                   |
| Bicycling, roller blading, or skateboarding  | X           |        |          |         |                     |
| Book club  |             | X      | X        |         |                     |
| Business or entrepreneurship club  | X           |        | X        |         | X                   |
| Chess club   |             |        | X        |         |                     |
| Chorus or choir  | X           | X      | X        | X       | X                   |
| Community service club   | X           | X      | X        | X       | X                   |
| Computer Club  | X           |        |          |         |                     |
| Conservation, recycling or environmental   | X           |        |          |         |                     |
| Creative writing or literary magazine  |             |        | X        |         |                     |
| Debate or speech team  |             | X      |          | X       |                     |
| Drama club   | X           | X      | X        | X       | X                   |
| Educational clubs  | X           | X      |          | X       | X                   |
| Foreign language club  |             | X      | X        | X       | X                   |
| Future Farmers of America club   |             |        |          | X       |                     |
| History club   |             |        |          | X       | X                   |
| Other subject matter clubs (art)   |             |        | X        | X       | X                   |
| Photography Club   |             | X      |          |         |                     |
| Science club (Please specify if there is a specific focus such as astronomy, robotics, Project Lead the Way) | X           | X      |          |         | X                   |
| Science fair   |             |        |          | X       |                     |
| Student council  | X           | X      | X        | X       | X                   |
| Student newspaper  |             |        | X        |         |                     |
| Student yearbook   | X           | X      | X        | X       | X                   |
| Theatre (e.g. school plays or musicals)  | X           | X      | X        | X       | X                   |
| Religious organizations  |             |        |          | X       |                     |
| Interscholastic sports   | X           | X      | X        | X       | X                   |
| Intramural sports  | X           | X      |          | X       |                     |
| <b><i>Sports available for HS (Boys/Girls)</i></b>   |             |        |          |         |                     |
| Baseball/softball  | B/G         | B/G    | B/G      | B/G     | B/G                 |
| Basketball   | B/G         | B/G    | B/G      | B       | B/G                 |
| Cheerleading or dance  | B/G         |        | B/G      | G       | G                   |
| Football   |             |        |          | B       |                     |
| Golf   |             | B/G    | B/G      | B/G     | B                   |
| Soccer   | B/G         | B/G    | B/G      |         | B/G                 |
| Swimming   |             | B/G    |          |         | B/G                 |
| Tennis   |             | B/G    | B/G      |         | B/G                 |
| Track  | B/G         |        | B/G      | B/G     | B/G                 |
| Volleyball   | G           |        | B/G      | B/G     | G                   |
| Wrestling  | B           |        | B/G      |         |                     |
| Cross country  |             |        | B/G      | B/G     | B/G                 |
| Ski/Snowboard  |             | B/G    |          | B/G     |                     |
| <b><i>HS career/planning services</i></b>  |             |        |          |         |                     |
| Help with filling out college/vocational/technical school  | X           |        | X        | X       | X                   |

|   | Lyndonville | Naples | Pavilion | Sherman | Wheatland<br>-Chili |
|---|-------------|--------|----------|---------|---------------------|
| applications  |             |        |          |         |                     |
| Help with filling out financial aid forms                             | X           |        | X        | X       | X                   |
| Assistance in writing essays for college applications                 | X           |        |          | X       | X                   |
| Days off from school to visit college or vocational/technical schools | X           |        | X        | X       | X                   |
| Career placement counseling   | X           |        | X        | X       | X                   |
| Practice interviews   | X           |        |          |         |                     |
| Other:  |             |        |          |         |                     |
| Dual credit for HS and College  | X           | X      |          | X       | X                   |
| Alternative/Stay-in/Dropout Prevention programs for HS                | X           | X      | X        | X       | X                   |
| Regents Alternative Program   |             |        |          |         |                     |
| Block Scheduling  |             |        |          | X       | X                   |
| Career & Technical courses  | X           | X      | X        | X       | X                   |
| Distance learning course(s)   | X           |        |          |         | X                   |
| Specialized Career Academy  | X           |        |          | X       |                     |
| Work-based internships  |             |        |          | X       | X                   |
| # of full time counselors (HS)  | 1           | 1.5    | 1        | .5      | 1                   |
| HS load per counselor   | 1:270       | 1:200  | 1:270    | 1:125   | 1:300               |
| Career Cruising/World of Work   |             |        |          | X       | X                   |
| “Check In” Program  |             |        | X        |         |                     |

Source: Comprehensive Program Evaluation Survey, 2008

## Discussion

We suggest it is entirely predictable that the larger schools surrounding Wheatland-Chili would offer a greater breadth of program than that found in the Wheatland-Chili Central School District, especially at the high school. We feel confident in making the following statement as a clear finding of our research. **If Wheatland-Chili were to merge with any of the districts contiguous to it, Wheatland-Chili students would have more program choices, especially at the high school level.** This is simply a reality of the numbers. If there are more students in the cohort, there is greater economy of scale and thus the opportunity to offer more programs. It is not clear that WCCSD would maintain its small elementary class size advantage in a merger. Currently only Rush-Henrietta boasts class sizes that compare to those found in the WCCSD. However, it is not clear that WCCSD would see larger elementary class size in a merged district. If Wheatland-Chili were to merge with a contiguous district, under current law, the new district would realize additional state aid which could be used to reduce class size. Nor is it clear that Wheatland-Chili will be able to financially maintain its current class sizes in the future if it does not reorganize. Therefore, we do not feel comfortable making a summary

statement about the direction of class size either in a merged district or in Wheatland-Chili if it remains independent.

A merged district would have many more extracurricular and athletic choices for Wheatland-Chili students. For example, Wheatland-Chili students currently do not have the choice of playing interscholastic football. Each of the contiguous districts currently offers a football program. More choices, however, do not necessarily mean more opportunities, as we illustrated in our varsity basketball example.

We identified four (4) districts with demographics that met our criteria of lower wealth, low enrollment, and high performing. In three (3) of these cases, enrollment was close to that found in Wheatland-Chili; in one (1) case it was lower. The population of the Wheatland-Chili District was in all cases as wealthy or wealthier than the comparison group and better educated. On average, 17% of the residents in the comparison group had at least a bachelor's degree. In WCCSD, 33.4% of residents have earned at least a bachelor's degree. Given the proximity of WCCSD to the University of Rochester and Rochester Institute of Technology, it is reasonable to assume that many residents have earned degrees above the bachelors.

In general, the program offerings in the selected high performing school districts do not exceed those found in Wheatland-Chili. Based on that sample, we feel comfortable in making the following statement as a clear finding of our research.

**Enrollment of approximately 700 students does not prohibit the Wheatland-Chili Central School District from being a high- performing district.**

## **Section V: Response to Question 2**

*If a comprehensive program cannot be maintained in its current state, what options could be considered to reach that goal?*

In answering this question, the team conducted several interviews with Suzanne Spear, the former Supervisor of District Organization for BOCES in Rural Services for the New York State Education Department. We interviewed Ms. Spear both by telephone and in person at the NYSED in Albany. Ms. Spear has since retired and her former title remains vacant in NYSED, but she continues to serve the department on a part time basis. Additionally, the team examined the “Guide to the Reorganization of School Districts in New York State,” an official publication of the State Education Department.

In order to fully appreciate the reorganization options available to Wheatland-Chili, a brief discussion regarding the organization of school districts in New York State is warranted.

New York State schools are classified as one of five types as follows: *city school districts*, *central high school districts*, *union-free school districts*, *central school districts*, and *common school districts*. Within each classification, there are sub-groups. For example, *city school districts* are divided into large city districts; i.e., cities with a population in excess of 125,000 and small city school districts. The large city districts are also known as the “Big Five” and include New York City, Yonkers, Buffalo, Rochester, and Syracuse. There are 57 small city school districts which range in size and dynamics from Albany to Little Falls. Locally, Batavia and Canandaigua are small city school districts.

*Central high school districts* are unique to Long Island and were a mechanism to allow a group of union free school districts to create a single district for their high school students.

There are three central high school districts on Long Island, each of which serves a number of small school districts that feed directly into the central high school district.

*Union-free school districts* are found prominently in the New York Metropolitan area, especially on Long Island. These are districts that are usually contiguous to the boundaries of a



single village. Locally, East Rochester is the only union-free school district in Monroe County. Union-free school districts may operate their own high school and 120 of the 161 union-free school districts in the state do so. Twenty-eight (28) union-free school districts do not operate any secondary program. Thirteen (13) union-free school districts are “special act districts,” meaning that they provide education to special populations of students and are not community schools.

*Central school districts* are the most numerous type of district statewide, representing 460 districts. All but two (2) of these districts operate a secondary program. In Monroe County, every school district is a central school district with the exception of the Rochester City School District and the East Rochester Union-Free School District.

Finally, *common school districts* are most often found in remote parts of the state. There are nine (9) common school districts in New York State. Two (2) of them provide education in Grades 1-4, one (1) K-2, one (1) K-5, one (1) K-6, and two (2) K-8. There are two (2) non-operating school districts in the state.

As of July 1, 2008, there were 697 school districts in New York State. This figure stands in sharp contrast to the early 20<sup>th</sup> Century when there were some 10,000 different operating school districts in New York State, the vast majority of which were common school districts. Often these common school districts were “grammar schools.” It was typical for a given township to contain several grammar schools that provided education in one, two or three-room school houses for children through eighth grade and to arrange for the children to attend a high school which was usually in a union-free school district. As noted earlier, the WCCSD was formed in 1954 of the various common school districts around the Scottsville Union-Free School District and has operated continuously ever since.

## **Reorganization Options Available to Wheatland-Chili Central School District**

What follows is a brief discussion of the various reorganization options that WCCSD's Board might consider. It is paramount that readers understand that these options require the cooperation of other school districts as well as public approval. The information in this section is drawn largely from the "Guide to the Reorganization of School Districts in New York State" published by the New York State Education Department, Education Law §1801-1804, 2510, 1518, 1505a, 1703, 2004, 2105, 1705, and Civil Service Law §70.

### *What is reorganization?*

Reorganization involves a change in district boundaries, governance, grade level and/or structure. The most common forms of reorganization are centralization and annexation. The Wheatland-Chili Central School District is itself a product of a centralization process completed in 1954. Wheatland-Chili could further centralize with a neighboring school district or be part of a larger centralization movement of several school districts.

Annexation means that one district ceases to exist and is joined to another district. The annexation of the common school district Border City by the Waterloo Central School District in Seneca County is an example. This is actually a more common form of reorganization than centralization.

Lastly, a rare form of reorganization is the dissolution of all or part of the existing delivery system (e.g., secondary school), coupled with the district sending students to another district on a tuition basis. Wyoming Central School District reorganized in this way.

### *What process would the district undertake to consider centralization?*

First and foremost, the district would have to find a partner that was willing to investigate reorganization with them. All districts in a centralization must be contiguous. Once identified, the two (2) districts, or perhaps more, typically would engage consultants to undertake a comprehensive study of the issues associated with reorganization. These studies should be

extensive and include an analysis of program, staff, facilities, debt service, and the financial implications of the reorganization.

With few exceptions, when these studies have been completed over the years, the data has encouraged reorganization, in part, because the state offers incentive aid to districts that reorganize. In the past, this aid was very attractive including a bonus in operating aid (now subsumed into foundation aid of 20% the first five (5) years of the reorganization. This amount then decreased each year by two percent (2%) until it was eventually eliminated. Reorganized districts also were eligible for additional building aid, and depending on the new district's aid ratio could receive as much as 95% of the approved cost of construction. These amounts have since changed to an initial contribution of 40% for the first five years then reduced by 4% each subsequent year. However, the basis of the aid is frozen in the first year. Our analysis, found in Question 3, includes the updated amounts.

The reorganization study has to be transparent and comprehensive. Quality studies include a full array of stakeholders and drill deeply to ascertain the implications of reorganization. Recently an appeal was made to the Commissioner of Education regarding a centralization that had been approved by the voters based on a study that had neglected to ascertain the full implications of the financial conditions of each of the two (2) districts involved in the study. When it was noted that voters approved the study without having full information regarding the financial condition of one (1) of the districts, the Commissioner overturned the referendum effectively ending, for the time being, the centralization of the two (2) districts.

Once the study is complete, it is usually presented to the community, respective boards of education, and the District Superintendent. The District Superintendent is also known as the "BOCES Superintendent" and is the Commissioner's official representative in the supervisory district. In this case, Wheatland-Chili is a member of the Monroe 2 BOCES. The District Superintendent is Michael O'Laughlin. Given a positive study, Board of Education support and indication of public support, the Commissioner of Education will "lay out" the new district.

The challenge for most reorganization efforts is this initial measure of public support. This is usually achieved through an advisory referendum or straw vote of the respective districts.

Generally, the Commissioner will require support from each of the two (2) districts, with votes counted separately and not co-mingled. Only after a positive vote from each district and the positive recommendation of the respective boards of education and/or the District Superintendent, will the Commissioner lay out the district and present it to the residents of the respective districts for a formal binding referendum. Again, Education Law §1803-a(3) provides that those centralization votes will be counted separately by district and not co-mingled and counted as one. Upon such affirmative referendum, the district becomes operational on July 1<sup>st</sup> following the vote. Centralized districts cannot further centralize with city school districts. Therefore, this study will not consider a reorganization between Wheatland-Chili and the Rochester City School District.

*What happens to employees in the respective districts once a centralization occurs?*

1. Teachers. For all essential purposes, in a centralization, the faculties of the respective districts are merged into one. Salaries, sick leave, and seniority that have been credited in the former district are carried over into the new district. Any position that is abolished is subject to statutory seniority rules with such affected individuals placed on a preferred eligible list for a period of seven (7) years after the dismissal. These rules also apply to tenure track administrators.

Superintendents are not guaranteed employment in the new district. However, the board of education of the new district is required to continue the contractual obligations established by the previous boards of education. Therefore, if the newly reorganized district chose not to employ one or more of the superintendents in the previous districts, the new district would be required to discharge its contractual obligations, less any income obtained from employment elsewhere.

2. Non-certified Employees. District employees not instructionally certified are covered by Civil Service law. The rules for Civil Service employees are a bit more complex, depending on classification and competitive or non-competitive status, etc. The State Education Department advises that the local Civil Service agency be involved in an analysis of Civil

Service employee status as part of a reorganization study. Generally such employees have seniority and transfer rights when centralization occurs.

3. Contracts. It is assumed that all contracts are binding on the new board of education despite the fact that the previous boards of education have dissolved. However, unlike the situation with superintendents' contracts, that has not been tested in litigation. It is generally understood that once the reorganization is authorized, the Public Employees Relations Board should be informed and bargaining units should be combined with contractual negotiations proceeding as soon as possible after the reorganization authorization.

*What happens to the two boards of education once a centralization occurs?*

After the affirmative referendum to centralize, the Commissioner of Education will call a special meeting of the District at which time a new board of education of five (5), seven (7) or nine (9) members will be elected to complete terms of three (3), four (4) or five (5) years as per the desires of the voters. Terms are staggered. Generally, terms vary and are often assigned by the number of votes received. The staggered terms ensures that the board of education will not turn over as a whole group at the same time. The previous boards of education continue their responsibilities until August 1.

*What process would the district undertake to consider annexation?*

Annexation is a similar process to centralization in many ways, but with very different ramifications for governance and employees. For simplicity purposes, annexation can be thought of as one district dissolving and becoming part of another. Historically it is the most common form of reorganization. Obviously this is usually a larger district annexing a smaller district. This was most common when small common districts wanted to join existing centralized or union-free districts. In this case, one central school district, Wheatland-Chili may be annexed by another contiguous central school district pending approval of the communities involved and the Commissioner.

The actual process the districts follow in annexation is similar in many ways to centralization. The Commissioner will issue an order of annexation only after a comprehensive study,

evidence of local support, and upon request of the respective boards of education and/or the District Superintendent. Also as with centralization, evidence of public support is usually garnered through an advisory referendum. Given the ramifications of annexation, the strong support of the annexed district is crucial in demonstrating public support to the Commissioner. If approved, for all practical purposes, the annexed district ceases to exist while the annexing district continues, unlike centralization where both districts in the reorganization cease to exist and a new district is formed.

As with centralization, the permissive referendum must pass in each affected district in order for the annexation to occur. The Commissioner is presented with the positive results of the advisory referendum, the comprehensive study, and the recommendations of the respective boards of education. He may then, on his own, issue an order for annexation. New York State will then provide petitions requesting a referendum on the issue or the boards of education may choose to require a referendum before they make their final recommendation to the Commissioner. When the referendum is held, the votes are counted separately in each district and not co-mingled. Once the annexation order is approved, the annexation itself becomes effective on the following July 1<sup>st</sup>. The new district assumes all property rights of the annexed district as well as all bonded debt. Accounts payable remain a charge to the former district.

*What happens to employees in the respective districts once an annexation occurs?*

This is where annexation is very different from centralization. Though teachers from the annexed district have rights to employment in the annexing district, they do not have “bumping rights” in the new district. So, if the annexing district required the services of none of the teachers in a given tenure area of the annexed district, these individuals would not have immediate employment rights in the new district. However, such teachers would be placed on the preferred eligibility list for a period of seven (7) years and the annexing district would be required to give them first preference for hiring. Once hired, all rights including salaries, sick leave, and seniority would be credited in the new district. All employees work under the collective bargaining agreements found in the annexing district. So, whereas the teachers and tenured track administrators in the annexed district have no initial rights of employment, they do have rights to be placed on a preferred eligibility list and once employed, carry all their

previous earned rights with them into the new district and now work under the new collective bargaining agreement.

The Superintendent of the annexed district is not guaranteed employment in the new district. However, the board of education of the surviving district is required to continue the contractual obligations established by the board of education of the annexed district. Therefore, if the newly reorganized district chose not to employ the superintendent of the annexed district, the new district would be required to discharge its contractual obligations.

*What happens to the two (2) boards of education once an annexation occurs?*

Qualified voters of the annexed district now become qualified voters of the annexing district as of the date that the order becomes final (usually July 1). They are eligible to vote on the budget and any matter affecting the new district following the vote and prior to July 1. It is typical that the board of education of the annexing district will propose a proposition at its first annual meeting providing additional seats on the board of education, thus allowing the opportunity for board members of the annexed district to participate in governance of the newly formed district. However, Education Law allows for a maximum of only nine (9) members for a central school district and there is no provision that would allow a board of education to increase that number. So, if an annexing district was already at nine (9) members, there would be no guaranteed opportunities for annexed board members or other community members to participate on an enlarged board of education. Of course, members of the annexed district could run for office and gain membership on the board of education through ordinary means.

*What does the research indicate are the results of Centralization or Annexation?<sup>11</sup>*

Whether termed consolidation, reorganization, centralization, or annexation many states have policies that require or actively encourage the merger of two or more districts into a single, larger system. For example, the Arkansas Omnibus Education Act 60 requires that any district enrolling fewer than 350 students either (1) consolidate with one or more other district(s) to create a new district that would meet the minimum size requirements, or (2) be annexed into an

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<sup>11</sup> This discussion draws from Sipple and Brent (2007) and Brent, Sipple, Wischnowski and Killeen (2004), sometimes using direct quotes and other times paraphrasing the underlying text.

existing district meeting those requirements (Johnson, 2006). Other states, including New York, encourage consolidation by providing incentives through operating or building aid programs (Lawrence, et. al. , 2002; Sielke, et. al 2001)

Proponents of consolidation policies argue two general points. First, small school districts, because of their comparative size, are educationally less effective than their larger counterparts (e.g., offer fewer courses). Secondly, small districts are more costly to operate than consolidated systems (Haller and Monk, 1986). If both of these arguments are correct, then consolidation is a cost-effective (or more efficient) alternative to operating independently small school districts.

Given the incentives to consolidate and the conventional wisdom that such efforts are cost-effective, it is somewhat surprising that only a small number of studies have examined whether the resulting consolidated districts are, or likely to be, more efficient. Further, a review of these studies suggests that it is ambiguous whether consolidating districts results in either a more educationally effective or less costly system than the status quo.

For example, researchers have examined the “educational effectiveness” of consolidation by comparing student achievement, student social development (e.g., extracurricular participation), graduation rates, school climate (e.g., disciplinary actions and student and teacher attitudes), curriculum comprehensiveness, and community responsiveness before and after the merger. With the exception of curriculum comprehensiveness, there is no definitive evidence that students of small rural schools have a lesser educational experience than those in larger schools (Arum, 2000; Fowler & Walberg, 1991; Haller, 1992; Haller, 1992; Haller & Monk, 1988; Howley, 1989; Howley & Howley, 2004; Monk & Haller, 1988; Nathan and Foley, 2001; Sipple, 2004; Verstegen, 1990).

With regard to cost, many assume that larger schools can offer a given instructional program at a lower expense than can smaller schools. The anticipated areas of saving includes lower administrative costs (e.g., one superintendent), more efficient use of buildings and grounds, and the ability to negotiate bulk purchase with vendors (Hiu and Yinger, 2007). It is also anticipated, however, consolidation would increase costs in other areas such as transportation



and teacher compensation. Teacher salaries could increase if one district has greater compensation than the other, and the combined salary structure is set to the higher of the two. When taken together, Bard, Gardener, and Wielan's (2005) recent review of rural consolidation studies indicates that consolidation could, but does not necessarily reduce per pupil expenditures (see also, Duncombe, Minor, and Ruggiero, 1995, Duncombe and Yinger, 2007; Reeves, 2004; Sher and Schaller, 1986; Sher and Tompkins, 1977).

Scholars have also considered how district consolidation affects rural communities more broadly. These efforts generally conclude that the loss of a rural school adversely affects the community's economy by eliminating a sizable employer and thereby fostering a decline in retail sales, property values, and tax revenues (Lyson, 2002; Sederberg, 1997, Sell and Leistriz, 1996). Rural schools are often the center of community social life, offering a reason and site for recreational, cultural, and civic events (e.g., sports, plays, dances, and political meetings) (Lyson, 2002; Peshkin, 1978). Further, Howley and Howley (2001) argue that student time is a hidden cost never accounted for in consolidation analyses. For example, one study of school consolidation reported that sleep deprivation, lower grades, poor fitness, and inability to participate in extracurricular activities follows from the lengthier bus rides (Schwartzbeck, 2003).

Overall, when we consider both the possible effects and costs of consolidation, the efficacy of the process is ambiguous. It is possible that consolidation could prove to be cost effective in certain cases. Our review of the literature, however, suggests that the advantages of consolidation are not nearly as dependable as they are commonly believed.

### **Tuition Options**

A second option open to the Board of Education of the Wheatland-Chili Central School is to contract out for services for different aspects of its school operation. Wheatland-Chili Central School District is a member of the Board of Cooperative Educational Services of the Sole Supervisory District of Western Portion of Monroe County, or BOCES 2, and as such is able to consolidate certain services with other districts and realize additional state support through BOCES aid. It should be noted that the Board aggressively pursues such options as they realize

not only efficiency, but increased state aid as per the BOCES aid formula. Although there may be additional options available to the district, the BOCES aid formula is not an open pipeline from Albany. Shared programs have to meet certain criteria and generally cannot be easily substituted for the core school program. A review of current school offerings does not suggest significant potential for savings through additional BOCES programs.

A more aggressive contractual approach, however, is to negotiate agreements for certain students to attend school in surrounding districts. The Board of Education could choose to negotiate with districts in the hope of sending all or some of their secondary students to contiguous districts in return for tuition. The decision to discontinue the high school program would require a referendum of all eligible voters in the Wheatland-Chili District. A similar referendum is not required in the receiving districts. The Board of Education would then decide which district each student would attend. On an efficiency basis, there are obvious advantages to both the sending and receiving district. If a receiving district is facing declining enrollment and struggling to maintain the viability of its current program, some additional student base could be helpful. The tuition would supplement the district's budget and not necessarily create a one-on-one cost relationship between the new students and the tuition received. For example, if a given district has class size guidelines of no more than 20 students in high school science classes, but are currently dealing with declining enrollment and actually have 16 or 17 students in such classes without an easy scheduling remedy, the addition of three (3) or four (4) students on a tuition basis to these classes does not necessarily create a corresponding cost increase for that district equal to the tuition. In other words, the receiving district can "profit" from its relationship with the sending district.

The sending district could choose to close existing facilities, eliminate most personal costs and limit its financial burden to costs for tuition and transportation. This would almost always result in a cost savings for the sending district.

The New York State Education Department has a formula for calculating out-of-district tuition. That formula is based on a number of variables as contained in each district's state aid calculation and thus, generates a different tuition for each district in the state. Our analysis assumes that districts would opt to use the state formula in any long-term relationship.

The policy considerations for both the sending and receiving district in a tuition arrangement are important. Agreements must be established which guarantee continuity of instruction for all tuition students. When multiple districts are involved, the district must have clear policy direction as to which students are eligible to attend which schools. Questions must be answered regarding the degree of parental choice that will be allowed and whether or not attendance zones will be used. In an interview with Suzanne Spear, former Supervisor of District Organization at BOCES in Rural Services for the New York State Education Department, she indicated that attendance zones can be problematic as students move from one attendance zone to another within a school year and do not want to change their high school experience. Another issue that needs to be recognized when multiple districts are involved is the inevitability of a pupil being unhappy in a given district and wanting to move to one of the other available districts. Recognizing these issues, choice is usually a good thing and providing parents and students with choice regarding their secondary education can be one of the great benefits of tuitioning.

In our area, the Wyoming Central School District chose to discontinue its high school operation and tuition its students to contiguous schools. Understanding their experience would be useful for the Wheatland-Chili Board if they choose to pursue this option. As part of our research, we interviewed Sandra Duckworth, Superintendent of the Wyoming Central School District. Wyoming dissolved its high school at the end of the 1990-1991 school year and now tuitions its students to four (4) contiguous districts. Superintendent Duckworth, who has been in the district for 16 years, has intimate knowledge of the issues associated with the tuition decision. In the case of Wyoming, they negotiated tuition agreements with districts at a tuition cost that is substantially less than the state formula. The districts in question also realize state aid on these students (minus the tuition), so there are real benefits to the receiving district. Superintendent Duckworth counts the most substantial benefit to the tuition program as cost savings. Wyoming has classes close to half the size of those found in Wheatland-Chili, approximately 30 compared with 50. Wyoming has experienced individual groups as low as 17.

At Wyoming, the cost of staffing a high school, supporting the administrative and counseling functions and running a comprehensive extra-curricular activity program became prohibitive when class sizes shrunk to typical levels of 30 and a low point of 17. Since the passage of the No Child Left Behind Act, these issues are only exacerbated. Students with disabilities now need to be taught only by highly qualified teachers, making staffing very difficult in medium and large schools and almost prohibitive in very small schools. Superintendent Duckworth feels that staffing a high school in her community would be beyond the means of district taxpayers.

The Wyoming superintendent is also very pleased with the high school experience her students are receiving. Wyoming students can choose from four (4) options, with the understanding that the choice is a full four-year commitment. According to Duckworth, students are welcomed into their new high school environments, and transitions have been almost seamless. Of course, there is usually another Wyoming student who has chosen the same high school, so it is possible that there is some level of social support for the Wyoming students.

Is it reasonable to assume that Wheatland-Chili would realize similar benefits if it chooses to pursue a reorganization strategy based upon tuitioning its high school students. Clearly however, the dynamics are not the same. Wheatland-Chili is about twice the size of Wyoming Central, so the cost analysis looks very different. Also, Wyoming, a very rural district, is surrounded by other rural districts. In the case of Wheatland-Chili, it is contiguous to very different districts. The southern border is contiguous to Caledonia-Mumford, a member of the Genesee-Wyoming BOCES, and perhaps even more rural than Wheatland-Chili. Moving east, most of that border is contiguous to the Rush-Henrietta Central School District; a member of the Monroe 1 BOCES, and very suburban in nature. A small part of Wheatland-Chili is contiguous to the Rochester City School District, which is one of the largest urban centers in New York. The majority of the northwestern, western borders are contiguous to the Gates-Chili Central School District and the Churchville-Chili Central School District, both members of the Monroe 2 BOCES. Gates is very suburban in nature while Churchville seems to be a suburban-rural mix. Brighton, another suburban district, though not contiguous, accepts tuition students on a limited basis and should also be considered.

Despite these differences, it is reasonable to suggest that a reorganization option available to the Wheatland-Chili Board of Education in conjunction with any or all of its contiguous neighbors would be to tuition either all secondary students (6-12 or 7-12) or just high school students to one or more of its contiguous districts. In ascertaining the feasibility of this option, the study team administered a survey to the superintendents of each of the contiguous districts along with Brighton to ascertain their ability to accept tuition students and their current policy regarding tuitioning. In addition, we ascertained the current tuition rate for each of these districts using NYSED data. According to Bruce Jesiolowski of the State Aid Office at NYSED, non-resident tuition calculations are governed by Commissioner’s Regulations as follows:

“The charge for the instruction of each nonresident pupil shall not exceed the actual net cost of educating such pupil. If the accounting records of the school district providing such instruction are not maintained in a manner which would indicate the net cost of educating such pupil, a school district shall compute the tuition rate in accordance with the formulae in NYCRR 174.2.”

In the most conservative of estimates, it is reasonable to assume that if formal negotiations were to begin between the Wheatland-Chili Board of Education and any of its contiguous neighbors, each receiving district would require the full tuition allowed by regulation. Schools cannot charge more than the state calculated rate. However, it should be noted that Wyoming Central negotiated a tuition rate with its neighbors that is less than the state allowed tuition rate.

The following table shows the allowable current tuition rates for each of the districts contiguous to Wheatland-Chili as well as Brighton. It should be emphasized that none of the districts contacted were asked to indicate an interest in accepting tuition students from Wheatland-Chili. Discussion on each of the districts follows:

Table 24 – Current Tuition Rates

| Current Tuition           | Brighton | Cal-Mum  | Churchville | Gates    | Rush-Hen | RSCD     |
|---------------------------|----------|----------|-------------|----------|----------|----------|
| Kindergarten<br>(1/2) day | \$4,428  | NA       | NA          | \$3,195  | \$4,696  |          |
| Elem.- Reg. Ed.           | \$7,902  | \$4,227  | \$4820      | \$6,788  | \$11,158 | \$316    |
| Elem, Sp Ed               | \$23,295 | \$13,396 | \$5,892     | \$15,746 | \$21,166 | \$12,272 |
| Sec.- Reg. Ed.            | \$13,878 | \$4,424  | \$5288      | \$9,121  | \$10,469 | \$306    |
| Sec. Sp. Ed.              | \$29,901 | \$13,593 | \$6,360     | \$18,079 | \$20,477 | \$17,610 |

Source: NYSED (Sp. Ed. rate with excess cost eligibility)

The study team appreciates the apparent lack of logic among these tuition rates. However, the calculations are complicated and include data regarding both state aid and local expenditures. What follows is the analysis of the issues associated with each district as potential tuition partners.

- Caledonia-Mumford.

Caledonia-Mumford extends around the southern and southwestern borders of the Wheatland-Chili Central School District and is a member of the Genesee Valley BOCES. There are certain complications with districts that consolidate from different BOCES, but nothing that would prevent a successful reorganization. Indeed, NYSED officials do not see this as a barrier. There are a fair number of district residents in the southern and southwestern portions of the Wheatland-Chili Central School District that may, indeed, find it attractive to send their children, either middle school and high school or only high school to Caledonia-Mumford. According to Caledonia-Mumford Superintendent David Dinolfo, the Caledonia-Mumford Central School District could accept from 75-125 middle school students and 100-150 high school students in their current physical plants. This averages out to 25 to 42 middle school students per grade level and 25 to 37 high school students per grade level, or about half of the total of a projected Wheatland class. Caledonia Mumford High School is **7.6 miles** from the Wheatland-Chili campus. (All mileage estimates are per WCCSD transportation supervisor). As part of an overall tuition strategy, this is significant.

- Churchville-Chili

Churchville-Chili occupies a portion of the western border of the Wheatland-Chili district. The Churchville-Chili superintendent projects that it can accommodate approximately 30 students per grade level, 7-12 without adding staff or classrooms. This amounts to a substantial portion of a typical Wheatland-Chili class. The Genesee Finger Lakes Regional Planning Council completed a comprehensive enrollment analysis for the Churchville-Chili Central School District in October 2004 (GFLRPC Web Site). This analysis projected fairly stable enrollment within the district through 2010. However, it is not clear that the projection is holding. According to the Churchville-Chili High School web site, current enrollment (2007-08) is 1,116, some 114 students, or about 10% less than projected in 2004. In an interview with Churchville-Chili Superintendent Pamela Kissel, she indicated that the district plans to revisit these projections in the fall of 2008. She further indicated that there is additional classroom availability at the secondary level and, with additional staff, Churchville-Chili could accommodate additional tuition students beyond the 30 indicated, if necessary. This amounts to about half of a typical Wheatland-Chili class without adding staff.

Churchville-Chili High School is **9 miles** from the Wheatland-Chili campus.

- Rush-Henrietta

The Rush-Henrietta Central School District is immediately east of Wheatland-Chili. The boundary line between the two (2) districts is the Genesee River. Rush-Henrietta High School is **9.5 miles** from the Wheatland-Chili campus. The Rush-Henrietta superintendent projects the district could accommodate up to 200 middle school students; however, he does not project space for high school students at this time. A review of the November, 2007 report of the district's Space Committee, bears that out (RH District Website). Indeed, it can be projected that Rush-Henrietta High School will continue to be "full" for the foreseeable future. Based on the Space Committee's 2007-2008 projections, the senior high school achieved an actual enrollment of 1,498 students. The committee's report on middle school enrollment from both Burger and Roth totals 1,316 and that is only three (3) grade

levels (6, 7, 8). Elementary totals do not suggest decline. There is no evidence that future classes will be smaller than current classes.

Rush-Henrietta Superintendent, Dr. Kenneth Graham indicated in his survey response that if Rush-Henrietta and Wheatland-Chili were to consolidate, he would depend on the Wheatland-Chili secondary building to house some of the new district's high school students, at least for the short term. The district is able to accommodate more middle school students primarily as a function of new construction at Burger Middle School.

As Rush-Henrietta is not able to accommodate high school students, it would offer only limited options as a partner in a tuition arrangement.

- Brighton

There is a point at which Brighton and Wheatland-Chili come very close to a common border, but in fact, are not contiguous. Just the same, Brighton High School is **14.5** miles from the Wheatland-Chili campus and, on a limited basis, would accept tuition students. Wheatland-Chili students who live in the northern portion of the district would have a commute shorter than 14.5 miles as all estimates are from the WCCSD campus.

Former Brighton Superintendent, Dr. Christopher Manaseri indicated that the district does have a permissive tuition policy, but that there is limited space in the district's buildings. Just the same, even a few students per grade level could be part of an overall tuition strategy by the Wheatland-Chili Board of Education.

- Gates-Chili

Gates-Chili projects it can accommodate up to 100 middle school students, but, according to Superintendent Rick Stein, no high school students. Gates-Chili High School is **10.6** miles from Wheatland-Chili campus.



As is the case with Rush-Henrietta, there is little basis for exploring a partnership agreement with a district that cannot accommodate high school students.

- Rochester City School District

In essence, the students of the Wheatland-Chili Central School District have always had the option of attending the Rochester City School District as both districts participate in the Urban-Suburban Program. Interviews with RCSD officials suggest that Wheatland-Chili students could continue to avail themselves of that option if Wheatland-Chili were to discontinue its high school program. The RCSD offers a host of options to its secondary students including career and technical education programs at Edison Technical High School, the International Baccalaureate Degree at Wilson and outstanding artistic opportunities at the School of the Arts. There are no less than 19 different high school options within the Rochester City School District.

If there was no high school option within the Wheatland-Chili district, it may well be that students, especially students living close to the city limits, would opt to attend one of the RCSD high schools. Given that no Wheatland-Chili students currently take advantage of the Urban-Suburban option, it is reasonable to assume that would be a small number. However, given impending class sizes in Wheatland-Chili below 60, even a few students would be part of an overall solution.

## **Discussion**

It appears that discontinuing all or some of Wheatland's secondary operations and sending students to other schools on a tuition basis is an option for the Wheatland-Chili Board of Education, within certain limitations. A tuition strategy would be based largely on a relationship with the Caledonia-Mumford and Churchville-Chili Central School Districts, with the possibility of a few students accommodated at Rush-Henrietta, Brighton, Gates-Chili and the Rochester City School District. In terms of logistics and policy issues, however, Suzanne Spear of the NYSED suggests, and we agree, that a more workable policy would be to limit choices to the two (2) districts most able to accommodate tuition students, Caledonia-Mumford

and Churchville-Chili. Again, that is a local board decision. Also, once again, it should be emphasized that the purpose of this study is to ascertain possible options. **The study team did not ask district officials if they would consider a tuition agreement and, at this point, no district has indicated that it has an interest in pursuing a long-term tuition agreement with the Wheatland-Chili Board of Education.** If the Board were interested in pursuing this option, it would be incumbent upon the boards of education of the various districts to open discussions. It should also be noted that although we would suggest that a two (2)-district arrangement would be the most workable policy, the district certainly could pursue an open policy allowing students to attend any number of districts. Wyoming Central reports no real issues contracting with multiple districts.

### **Advantages of Tuitioning**

The primary advantage of a tuition strategy is lower costs as a function of improved economies of scale. A complete and accurate analysis of the cost benefits of tuitioning would require a detailed accounting of all costs including individual salaries, benefits, supplies, equipment and contractual costs. That analysis should be conducted if the district chooses to further investigate a tuition option. For the purposes of this study, we present an analysis based upon specific expenditures found in the district budget and information available on the New York State Education State Aid web site. We believe that our analysis is conservative.

The total cost per pupil at Wheatland-Chili is \$21,024 for the 2008-09 school year, based upon the approved budget divided by the district's spring 2008 enrollment including both in-district students and students currently attending out of district special education programs.

Eliminating from our analysis the Debt Service and General Support categories, as well out of district tuition costs, we arrive at a fixed cost of \$17,287 per on-campus pupil. High school students are substantially more expensive to educate than other students, as they require more elaborate academic, support, and extracurricular programs. Given a very conservative premium of 20% to educate high school students, (SED officials agree this is a conservative estimate) the cost per pupil in Wheatland-Chili High School can be estimated at \$20,744 with debt service and general support removed from the formula. That is substantially higher than the stated tuition to either Caledonia-Mumford (\$4,424) or Churchville-Chili (\$5,228). Offsetting these

cost savings are additional costs for transportation. It is beyond the scope of this study to provide a detailed transportation scheme to the two (2) districts most able to accept students. However, using a simplified model of 220 high school students, with half going to each district, and using three (3) bus runs going to each receiving high school, twice a day, with two (2) additional runs each school day, it is possible to calculate a very conservative cost for additional transportation. Interestingly, Wyoming Central has always used a shuttle scheme to transport its high school students who attend other schools on a tuition basis according to Sandra Duckworth. Our analysis follows:

**Table 25- Cost/Savings Estimate for Tuition Option**

| Costs: Tuition   | Tuition  | Pupils | Total Tuition | Totals             |
|--|----------|--------|---------------|--------------------|
| Cal-Mum (RE)   | \$4,424  | 95     | \$420,280     |                    |
| Cal-Mum (SE)*  | \$13,593 | 15     | \$203,895     |                    |
| Churchville  | \$5,288  | 95     | \$581,680     |                    |
| Churchville (SE)*  | \$6,360  | 15     | \$95,400      |                    |
|  |          |        | \$1,301,255   | <b>\$1,301,255</b> |
| Costs: Transportation  |          |        |               |                    |
|  | Miles    | Days   | Per mile*     | 10 daily trips**   |
| Cal-Mum  | 7.6      | 190    | 1.56          | \$22,563           |
| Churchville  | 9        | 190    | 1.56          | \$26,719           |
| Total Cost (Buses)   |          |        |               | <b>\$49,281</b>    |
| *estimate from NYSAPT former president, S. Goble + 25%                       |          |        |               |                    |
| **assumes max 40 students per shuttle. Three regular and two special per day |          |        |               |                    |
| Labor Cost per Run (assumes approx one hour driving total)                   |          |        |               | \$24               |
| Total Runs   |          |        |               | 3,800              |
| Total Labor  |          |        |               | <b>\$45,600</b>    |
| Total Cost (Gross)   |          |        |               | <b>\$94,881</b>    |
| State Aid (assume 70.9% Transportation Aid)                                  |          |        |               | <b>\$67,271</b>    |
| Net Cost (to local taxpayers)  |          |        |               | <b>\$27,610</b>    |
| <b>Total Costs</b>   |          |        |               | <b>\$1,328,865</b> |
| <b>Aid Loss</b>  |          |        |               |                    |
| Loss of Foundation Aid (220 +30)   |          |        | \$1,102,203   | <b>\$1,102,203</b> |
| Loss of BOCES aid for HS programs (est)**                                    |          |        | 260,000       | <b>\$260,000</b>   |
| Loss of Categorical Aids   |          |        | 165,000       | <b>\$165,000</b>   |
| <b>Total Aid Loss</b>  |          |        |               | <b>\$1,305,880</b> |
| Total Costs plus Aid Loss  |          |        |               | <b>\$2,634,745</b> |
| Estimated cost per pupil current   |          |        |               | <b>\$20,744</b>    |
| Typical High School Enrollment   |          |        |               | <b>220</b>         |
| Estimated cost to provide high school program                                |          |        |               | <b>\$4,563,680</b> |
| Estimated savings from tuition program                                       |          |        |               | <b>\$1,928,935</b> |

\* assumes apx. 13% classification rate

\*\*assumes TAFPU of 261 and foundation aid of \$4223

Again, we see this as a conservative analysis. It assumes a premium of 20% for high school costs per pupil. Once high school classes dip below 100 pupils (which happened long ago at Wheatland-Chili), it becomes more expensive to run a high school with a comprehensive program. Thus the 20% assumption may be low for Wheatland-Chili. The analysis also works from 220 students, which is an optimistic estimate for WCHS enrollment in some future four year periods. Furthermore, the analysis leaves all general support and debt service costs as fixed and assumes the full tuition costs allowed by law charged to the district. It should be noted that current legislation gives districts the flexibility to allow the aid to follow the child and deduct the tuition from their aid calculations, or allow the sending district to keep the aid and pay the full tuition, whichever is in the best interests of the district. The district cannot double dip.

Based on our analysis, we feel comfortable making the following statement:

**If the Wheatland-Chili community chose to discontinue its high school program and send its students to a contiguous district on a tuition basis, there would be cost savings and a potential reduction in the tax levy.**

A second advantage of a tuition strategy would be improved access for all students to a broader range of course offerings and extracurricular activities.

**If Wheatland-Chili High School students were to attend either Caledonia-Mumford or Churchville-Chili High School, they would realize program opportunities not currently available to them at Wheatland-Chili.**

### **Disadvantages to Tuitioning**

The primary disadvantage to a tuition strategy is the perceived impact on the community as a function of losing its secondary education program. A community is often identified, in part, by its association with a high school. The weight of this perception is identified as the study team answers Question 4. It should also be noted that individual students might struggle with a loss of identity in a tuition arrangement.

A second and significant disadvantage to a tuition strategy is the complexity and uncertainty associated with such a plan. The following is intended only to illustrate some of the issues and questions the Wheatland-Chili Board would have to face:

- If for some reason one of the districts to which WCCSD tuitioned students suddenly found itself with significant enrollment growth, would they be forced to discontinue, leaving some Wheatland-Chili students without a high school program?
- If one of the districts were to engage in a building program, in part as a function of the Wheatland-Chili students, would costs to Wheatland-Chili residents increase?
- If for some reason the Wheatland-Chili Central School District suddenly found itself experiencing significant development, would it want to reconsider its option of tuitioning students and how would it deal with those students who are receiving services and are satisfied with their high school program?
- Would Wheatland-Chili parents feel disenfranchised in dealing with one of the contiguous districts, knowing that they do not participate in board of education elections?
- Would parent groups from contiguous districts welcome Wheatland-Chili parents into parent organizations and governance committees?
- How would the Wheatland-Chili Board of Education handle parent requests for changes?
- One can not quantify the advantages of attending a very small high school. Some private schools limit their classes to the very number Wheatland-Chili would discontinue. The advantages of smallness would be lost.

Another serious issue associated with a tuition strategy involves faculty and staff of the Wheatland-Chili Central School District. Unlike BOCES employees who are protected against “district takeovers” of program, there is no protection for Wheatland-Chili staff if the district

were to dissolve all or part of their secondary program. There could be a massive layoff of secondary staff. Though staff would have seniority rights within the Wheatland-Chili district, such rights for teachers are accrued only in tenure areas in which the teacher has rendered service and where there are less senior people, who would then be subject to layoff. The long-term savings the district might realize through a tuition strategy would be partially offset by the costs of these layoffs.

In addition, schools are not global corporations. If the Board of Education were to proceed with this strategy, it would mean very difficult discussions about the livelihoods of many of their friends and neighbors. Long term, even beloved high school teachers, could find themselves unemployed.

The study team will not make recommendations to the Board of Education as this is a function of local decision making and the aspirations of community members, faculty, staff, and the students themselves. However, in answer to the question, ***“is it reasonable to conclude that an option open to Wheatland-Chili Central School District is to further investigate sending its middle school and high school or just its high school students to other districts on a tuition basis?”*** the answer is clearly yes. From a logistical position, the obvious solution would be to consider an arrangement with Churchville-Chili and Caledonia-Mumford. Wheatland-Chili is looking at class size potentially below 50 at some high school grade levels in the coming years. No grade is projected to be above 67. Tuitioning Grade 7-12 students would require an average of **320** placements over the next five (5) years. We have limited our discussion thus far to high school students. Tuitioning only 9-12 students would require about 210 annual placements. This also assumes that there will be absolute fidelity to class size through the years not impacted by some other factor. Together, the Churchville-Chili Central School District and the Caledonia-Mumford Central School District can accommodate all of those placements. It should be again emphasized that districts have not been formally approached to ascertain interest.

## **Technology**

Another option open to the Board of Education of WCCSD is to continue its current program and provide additional classes through web based programs or distanced learning. The district is already pursuing on-line courses using Accelerate U., which is offered by the Wayne-Finger Lakes BOCES. These classes appear to be most cost effective as they are eligible for BOCES aid. Advanced Placement classes are \$450 while other classes are \$400. After BOCES aid, these classes are very inexpensive, about \$90 for an A.P. class and \$75 for the other courses. Available AP courses include:

English Literature and Composition  
English Language and Composition  
Calculus  
Statistics  
Biology  
Chemistry  
Physics  
Psychology  
U.S. Government and Politics  
U.S. History  
French  
Spanish

All N.Y. S. high school requirements are offered. In addition classes are offered in electives such as Oceanography, Coastal Ecology, Anthropology, Digital Photography, Web Design, Programming, Sociology and Psychology. Finally, three languages, Spanish, French and German are available. Acceptance of Accelerate U. credits is at the discretion of the principal of the school. However before Accelerate U. can be offered in a school, the bargaining unit has to “sign off” on the class, as most negotiated agreements have a phrase protecting “unit work”. In this case, a class that would ordinarily be offered by a member of the Wheatland-Chili faculty could not be subcontracted without the permission of the bargaining unit. Assuming these issues can be worked out, we are comfortable indicating the following as a finding of our study.



**Technology is an option to expand course selection without significant additional expense. It is not an option that reduces current expenses.**

On-line courses are an emerging option for all schools. Accelerate U. reports that 12% of its students take advanced classes while 42% of its students are identified as “at risk”. The remaining students (46%) are “regular students,” who are either making up classes they failed, or taking classes at home perhaps due to absence. Approximately 70% of students who enroll in Accelerate U. classes are successful.

## **Section VI: Response to Question 3**

*How would each of those possible options (as identified in Question 2) impact the district programmatically, fiscally, and community identity?*

In essence, the issues associated with program are identified in Question 1. Each of the contiguous districts to WCCSD has a broader program than that found in Wheatland-Chili. It is reasonable to assume that if WCCSD were to merge with any of its neighbors, WCCSD students would enjoy all of the program advantages available in the contiguous district. If the tuition option were chosen, one can also assume that WCCSD students would enjoy all of the program options available in the partner district. However, it is not easy to predict what new programs would be established using the additional aid from a merger or the cost savings and additional revenue from a tuition arrangement. It is, however, abundantly clear, that any of the reorganization options reviewed in this analysis would provide additional program advantages to WCCSD students and have the potential to allow additional program options to all of the students in the reorganized district. We now turn our attention to the fiscal implications of merger. The analysis of the costs and savings from the tuition option are found in question 2.

### **Fiscal Implications of Consolidation**

In this section we consider several fiscal implications of a merger or annexation between WCCSD and (1) Rush-Henrietta, (2) Gates-Chili, (3) Churchville- Chili (4) Caledonia-Mumford. Because the fiscal implications discussed below, specifically the calculation of operating reorganization incentive aid, would not differ whether the reorganization was a centralization or annexation, we will use the term merger throughout the discussion to note the arrangement. As we stated earlier, the figures below are necessarily speculative. State and local economic and social conditions are in a constant state of flux, any number of which could counter our estimates. Legislative changes to New York's school finance system, new academic requirements, and shifts in local property tax bases represent a few such variables.

*Sources of Revenue*

Table 26 reports the distribution of revenues among Federal, State, and local sources for districts in Monroe County and New York State. As evidenced, there is considerable variation among districts throughout the county generally, and WCCSD and the four districts under consideration for merger.

**Table 26 - Revenue Sources, 2005-2006**

| District          | Federal<br>(Percent) | State<br>(Percent) | Local<br>(Percent) |
|-------------------|----------------------|--------------------|--------------------|
| Wheatland-Chili   | 3.44%                | 45.31%             | 51.25%             |
| Rush-Henrietta    | 2.89%                | 33.21%             | 63.90%             |
| Churchville-Chili | 2.66%                | 54.54%             | 42.80%             |
| Gates-Chili       | 2.89%                | 45.35%             | 51.76%             |
| Caledonia-Mumford | 3.32%                | 58.65%             | 38.02%             |
|                   |                      |                    |                    |
| Brighton          | 2.18%                | 25.50%             | 72.32%             |
| Brockport         | 3.04%                | 58.70%             | 38.25%             |
| East Irondequoit  | 3.63%                | 45.62%             | 50.74%             |
| East Rochester    | 3.48%                | 46.12%             | 50.40%             |
| Fairport          | 1.86%                | 39.06%             | 59.09%             |
| Greece            | 4.35%                | 46.37%             | 49.28%             |
| Hilton            | 2.80%                | 53.50%             | 43.70%             |
| Honeoye           | 2.15%                | 40.89%             | 56.96%             |
| Penfield          | 2.16%                | 34.13%             | 63.71%             |
| Pittsford         | 1.62%                | 24.17%             | 74.21%             |
| Rochester         | 11.57%               | 67.16%             | 21.26%             |
| Spencerport       | 2.76%                | 50.89%             | 46.36%             |
| West Irondequoit  | 2.33%                | 49.52%             | 48.15%             |
| Webster           | 2.17%                | 37.21%             | 60.62%             |
|                   |                      |                    |                    |
| New York State    | 6.13%                | 42.93%             | 50.94%             |

Source: NYSED. [http://www.oms.nysed.gov/faru/Profiles/profiles\\_cover.htm](http://www.oms.nysed.gov/faru/Profiles/profiles_cover.htm)

## Federal Sources

Because federal aids (e.g., Title I) are largely dependent on students counts rather than district actions, it is reasonable to assume that federal revenue sources would continue to follow the children and the combined percentage of federal share change accordingly. In other words, a merger between WCCSD and another district would not result in additional Federal aid because of the reorganization, but simply a combination of existing aids.

## State Sources (*excluding Operating Reorganization Incentive Aid*)

The state share, on the other hand, is dependent on a combination of district choice and local fiscal conditions. For example, districts can choose, or choose not to undertake capital projects supported by building aids – such decisions alter the amount of aid the district will derive from the state and, accordingly, the percentage share of total resources secured from state sources.

That said, a merger between WCCSD and any of the four districts would necessarily result in a permanent change to any state aids that are based on district wealth measures, typically termed the combined wealth ratio (CWR) – a figure that accounts for a district’s income per pupil and property wealth per pupil in reference to statewide district averages. A CWR of 1.0 represents a district of average combined wealth. A CWR that is less than 1.0 indicates that the district is of below average wealth, and a CWR that is greater than 1.0 indicates that the district is of above average wealth.

**Table 27 - District Wealth Comparisons**

| District          | 2004 Full Value | Full Value Per TWPU | 2004 Income     | Income Per TWPU | Combined Wealth Ratio |
|-------------------|-----------------|---------------------|-----------------|-----------------|-----------------------|
| Wheatland-Chili   | \$302,839,237   | \$298,952           | \$124,339,592   | \$122,743       | 0.799                 |
| Rush-Henrietta    | \$2,786,507,782 | \$405,723           | \$805,470,270   | \$117,278       | 0.904                 |
| Churchville-Chili | \$1,056,896,448 | \$192,793           | \$528,023,272   | \$96,319        | 0.577                 |
| Gates-Chili       | \$1,550,046,054 | \$247,255           | \$613,450,045   | \$97,854        | 0.647                 |
| Caledonia-Mumford | \$279,601,293   | \$203,791           | \$112,692,603   | \$82,137        | 0.538                 |
|                   |                 |                     |                 |                 |                       |
| Brighton          | \$1,530,845,033 | \$360,283           | \$840,478,176   | \$197,806       | 1.146                 |
| Brockport         | \$993,621,912   | \$180,297           | \$426,297,412   | \$77,353        | 0.494                 |
| East Irondequoit  | \$1,155,015,499 | \$269,863           | \$478,118,078   | \$111,709       | 0.724                 |
| East Rochester    | \$440,587,172   | \$276,750           | \$159,075,841   | \$99,922        | 0.689                 |
| Fairport          | \$2,485,162,657 | \$288,502           | \$1,191,959,200 | \$138,374       | 0.843                 |
| Greece            | \$3,706,940,135 | \$243,030           | \$1,575,031,571 | \$103,260       | 0.661                 |
| Hilton            | \$1,138,566,897 | \$212,935           | \$529,488,805   | \$99,025        | 0.611                 |
| Honeoye           | \$887,261,281   | \$276,061           | \$416,770,638   | \$129,673       | 0.797                 |
| Penfield          | \$1,816,071,339 | \$324,704           | \$917,690,926   | \$164,078       | 0.980                 |
| Pittsford         | \$2,961,635,733 | \$435,791           | \$1,693,069,338 | \$249,127       | 1.421                 |
| Rochester         | \$5,092,472,360 | \$118,018           | \$2,290,211,303 | \$53,116        | 0.332                 |
| Spencerport       | \$1,129,256,879 | \$216,043           | \$489,667,158   | \$93,680        | 0.595                 |
| West Irondequoit  | \$1,098,525,037 | \$225,477           | \$541,302,327   | \$111,104       | 0.670                 |

Source: NYSED. General Formula Aid Output Report (GEN). Updated 6/16/08

As *Table 27* reports, WCCSD's CWR indicates the district has below average wealth when compared to state averages, but is the second wealthiest district when compared to the other Monroe County districts under consideration. It follows then that a merger would prompt the calculation of a new CWR based on the newly aggregated wealth of the respective districts. We offer the figures in *Table 24(a-d)* to illustrate this phenomenon. For example, using data derived from the State's 2006-07 General Formula Aid Output Report (GEN) we estimated the CWR that would result from the merger of WCCSD with each of the four districts. As anticipated, the estimated CWR would fall between each of the districts pre-merger figures. If WCCSD were to merge with Rush-Henrietta, the students of Wheatland-Chili would now attend a somewhat wealthier district as defined by the state and, accordingly receive less state aid per pupil. Alternatively, if WCCSD were to merge with Gates-Chili, Caledonia-Mumford

or Churchville- Chili, Wheatland-Chili students would now attend a somewhat poorer district in the eyes of the state and receive more aid per pupil.

**Table 28 (a) - Estimates of Merged Combined Wealth Ratio (CWR)**  
**Wheatland-Chili and Rush-Henrietta**

|                                    | <u>Source</u> | Wheatland-Chili | Rush-Henrietta   | Merged Estimate  |
|------------------------------------|---------------|-----------------|------------------|------------------|
| 2003 Actual Valuation              | GEN 2006-07   | \$ 290,456,603  | \$ 2,676,689,286 | \$ 2,967,145,889 |
| 2005-6 TWPU                        | GEN 2006-07   | 1097            | 6897             | 7994             |
| Actual Valuation per TWPU          | GEN 2006-07   | \$ 264,773      | \$ 388,094       | \$ 371,172       |
| Pupil Wealth Ratio                 | GEN 2006-07   | 0.692           | 1.015            | 0.971            |
| Pupil Wealth Ratio * .50           | GEN 2006-07   | 0.346           | 0.507            | 0.486            |
| 2003 AGI                           | GEN 2006-07   | \$ 118,413,809  | \$ 736,238,924   | \$ 854,652,733   |
| AGI per TWPU                       | GEN 2006-07   | \$ 107,943      | \$ 106,747       | \$ 106,912       |
| Alternate Pupil Wealth Ratio       | GEN 2006-07   | 0.886           | 0.876            | 0.878            |
| Alternate Pupil Wealth Ratio * .50 | GEN 2006-07   | 0.443           | 0.438            | 0.439            |
| Combined Wealth Ratio (CWR)        | GEN 2006-07   | 0.789           | 0.945            | 0.924            |

**Table 28(b) - Estimates of Merged Combined Wealth Ratio (CWR)**  
**Wheatland-Chili and Churchville-Chili**

|                                    | <u>Source</u> | Wheatland-Chili | Churchville-Chili | Merged Estimate  |
|------------------------------------|---------------|-----------------|-------------------|------------------|
| 2003 Actual Valuation              | GEN 2006-07   | \$ 290,456,603  | \$ 1,005,489,736  | \$ 1,295,946,339 |
| 2005-6 TWPU                        | GEN 2006-07   | 1097            | 5365              | 6462             |
| Actual Valuation per TWPU          | GEN 2006-07   | \$ 264,773      | \$ 187,416        | \$ 200,549       |
| Pupil Wealth Ratio                 | GEN 2006-07   | 0.692           | 0.49              | 0.525            |
| Pupil Wealth Ratio * .50           | GEN 2006-07   | 0.346           | 0.245             | 0.262            |
| 2003 AGI                           | GEN 2006-07   | \$ 118,413,809  | \$ 485,675,394    | \$ 604,089,203   |
| AGI per TWPU                       | GEN 2006-07   | \$ 107,943      | \$ 90,526         | \$ 93,483        |
| Alternate Pupil Wealth Ratio       | GEN 2006-07   | 0.886           | 0.743             | 0.768            |
| Alternate Pupil Wealth Ratio * .50 | GEN 2006-07   | 0.443           | 0.371             | 0.384            |
| Combined Wealth Ratio (CWR)        | GEN 2006-07   | 0.789           | 0.616             | 0.646            |

**Table 28(c) - Estimates of Merged Combined Wealth Ratio (CWR)**  
**Wheatland-Chili and Gates-Chili**

|                                    | <u>Source</u> | Wheatland-Chili | Gates-Chili      | Merged Estimate  |
|------------------------------------|---------------|-----------------|------------------|------------------|
| 2003 Actual Valuation              | GEN 2006-07   | \$ 290,456,603  | \$ 1,491,867,545 | \$ 1,782,324,148 |
| 2005-6 TWPU                        | GEN 2006-07   | 1097            | 6174             | 7271             |
| Actual Valuation per TWPU          | GEN 2006-07   | \$ 264,773      | \$ 241,637       | \$ 245,128       |
| Pupil Wealth Ratio                 | GEN 2006-07   | 0.692           | 0.632            | 0.641            |
| Pupil Wealth Ratio * .50           | GEN 2006-07   | 0.346           | 0.316            | 0.321            |
| 2003 AGI                           | GEN 2006-07   | \$ 118,413,809  | \$ 612,590,144   | \$ 731,003,953   |
| AGI per TWPU                       | GEN 2006-07   | \$ 107,943      | \$ 99,220        | \$ 100,537       |
| Alternate Pupil Wealth Ratio       | GEN 2006-07   | 0.886           | 0.814            | 0.825            |
| Alternate Pupil Wealth Ratio * .50 | GEN 2006-07   | 0.443           | 0.407            | 0.413            |
| Combined Wealth Ratio (CWR)        | GEN 2006-07   | 0.789           | 0.723            | 0.733            |

**Table 28(d) - Estimates of Merged Combined Wealth Ratio (CWR)**  
**Wheatland-Chili and Caledonia-Mumford**

|                                    | <u>Source</u> | Wheatland-Chili | Caledonia-Mumford | Merged Estimate |
|------------------------------------|---------------|-----------------|-------------------|-----------------|
| 2003 Actual Valuation              | GEN 2006-07   | \$ 290,456,603  | \$ 263,739,010    | \$ 554,195,613  |
| 2005-6 TWPU                        | GEN 2006-07   | 1097            | 1364              | 2461            |
| Actual Valuation per TWPU          | GEN 2006-07   | \$ 264,773      | \$ 193,357        | \$ 225,191      |
| Pupil Wealth Ratio                 | GEN 2006-07   | 0.692           | 0.505             | 0.589           |
| Pupil Wealth Ratio * .50           | GEN 2006-07   | 0.346           | 0.252             | 0.295           |
| 2003 AGI                           | GEN 2006-07   | \$ 118,413,809  | \$ 109,583,484    | \$ 227,997,293  |
| AGI per TWPU                       | GEN 2006-07   | \$ 107,943      | \$ 80,339         | \$ 92,644       |
| Alternate Pupil Wealth Ratio       | GEN 2006-07   | 0.886           | 0.659             | 0.761           |
| Alternate Pupil Wealth Ratio * .50 | GEN 2006-07   | 0.443           | 0.329             | 0.380           |
| Combined Wealth Ratio (CWR)        | GEN 2006-07   | 0.789           | 0.581             | 0.675           |

Our point here is not to predict how state aid (excluding Operating Reorganization Incentive (ORI) Aid discussed subsequently) alters the academic program that would be available to WCCSD students following a merger. Instead, we seek only to demonstrate that a merger would alter those aids that are dependent on district wealth.

State Sources - Reorganization Incentive Aid

New York State offers two (2) aids to encourage and facilitate the merger of two (2) or more districts. The first, Reorganization Incentive Building (RIB) Aid provides for Education Law Section 3602(14). In order to provide a defensible estimate of the RIB aid that would result from a merger between WCCSD and each of the other districts requires that the affected districts undertake a comprehensive analysis of the existing and prospective infrastructure. Accordingly, such estimates extend well beyond the scope of this analysis. The text of both aspects of the law follows:

The second aid, Operating Reorganization Incentive Aid offers merged

**REORGANIZATION INCENTIVE AID**  
**[Section 3602(14) of the Education Law]**

Two forms of incentive aid to encourage school district reorganizations into more effective and efficient units are available.

**1. REORGANIZATION INCENTIVE OPERATING AID**  
**[Section 3602(14) (d) and (d-1) of the Education Law]**  
**(2007-08 Estimated Total= \$0.0 Million)**

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

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

.40 X (2006-07 Selected Operating Aid per Pupil X Total Aidable Pupil Units)

For the purposes of this aid, the 2006-07 Selected Operating Aid per Pupil X TAPU is the amount frozen as of the date upon which a data file was created for the 2/15/07 State Aid Estimates; [5] that is, it will not be recalculated again during the 14 years a reorganized district receives this aid. After receiving Reorganization Incentive Operating Aid for 5 years, the additional 40% apportionment will be reduced by 4 percentage points each year until the apportionment reaches 0 in the fifteenth year of reorganization. The sum of Selected Operating Aid per pupil X TAPU and Incentive Operating Aid may not exceed 95 percent of the district's Approved Operating Expense used for aid calculations in the current school year.



**2. REORGANIZATION INCENTIVE BUILDING AID**  
**[Section 3602(14) of the Education Law]**  
**(2007-08 Estimated Total = \$14.8 Million)**

Incentive Building Aid is 25 percent of the Building Aid otherwise paid on an approved building project for districts that reorganized prior to July 1, 1983. Aid is paid on such projects for which the general construction contract is signed prior to July 1, 2008 or within 10 years from the effective date of reorganization, whichever is later. For school districts that reorganized on or after July 1, 1983, Incentive Building Aid is 30 percent of the Building Aid otherwise paid on an approved building project. Aid is paid on such projects for which the general construction contract is signed prior to July 1, 2008 or within 10 years from the effective date of the reorganization, whichever is later. In no case, however, may the sum of regular Building Aid (including the 10% Incentive Aid) and Incentive Building Aid exceed 95 percent of approved building expenditures in these areas, or 98 percent for districts eligible for the high needs supplemental building aid ratio as described on the previous page.

**Note:** There is no Reorganization Incentive Building Aid for expenses associated with the refinancing of retro projects that are reimbursed by the State at a rate of 100%.

- Please refer to the 2006-07 State Aid Handbook for a detailed explanation of how Operating Aid was calculated prior to its repeal in 2007-08.

Unlike RIB aid, it is possible (and desirable) to estimate the increase resources that would result from ORI aid. We provide our estimates in *Table 25 (a-c)*. Andrea Hyary, Bureau Chief New York State Office of State Aid reviewed our estimates and we are confident that our calculations reflect current Education Law. That said, the estimates rest on an assumption that is worthy of note. We do not adjust the Base Operating Aid figures that we use to calculate ORI aid for increases in the costs of education over time, in other words, inflation. Education Law dictates that the 2006-07 Operating Aid figures used to determine in ORI aid be “frozen” based on data on file as of February 2007 (Section 3602-14(d)). Given that education costs will likely rise over the next 20 years and that Base Operating Aid is constant, it follows that

purchasing power of the ORI aid will decline at the rate of inflation throughout the period of the award. Stated differently, if WCCSD and Rush-Henrietta were to merge/annex, it will not be able to use the \$5,311,150 ORI it receives in 2021-22 to purchase that same level of services it could today with an equal amount.

**Table 29 (a) - Wheatland-Chili CSD and Rush-Henrietta Reorganization**

| Year  | Base Operating Aid | Incentive Aid Percent | Incentive Aid |
|---|--------------------|-----------------------|---------------|
| 2008-09 (Year 1)  | \$ 13,277,875      | 40%                   | \$ 5,311,150  |
| 2009-10   | \$ 13,277,875      | 40%                   | \$ 5,311,150  |
| 2010-11   | \$ 13,277,875      | 40%                   | \$ 5,311,150  |
| 2011-12   | \$ 13,277,875      | 40%                   | \$ 5,311,150  |
| 2012-13   | \$ 13,277,875      | 40%                   | \$ 5,311,150  |
| 2013-14   | \$ 13,277,875      | 36%                   | \$ 4,780,035  |
| 2014-15   | \$ 13,277,875      | 32%                   | \$ 4,248,920  |
| 2015-16   | \$ 13,277,875      | 28%                   | \$ 3,717,805  |
| 2016-17   | \$ 13,277,875      | 24%                   | \$ 3,186,690  |
| 2017-18   | \$ 13,277,875      | 20%                   | \$ 2,655,575  |
| 2018-19   | \$ 13,277,875      | 16%                   | \$ 2,124,460  |
| 2019-20   | \$ 13,277,875      | 12%                   | \$ 1,593,345  |
| 2020-21   | \$ 13,277,875      | 8%                    | \$ 1,062,230  |
| 2021-22   | \$ 13,277,875      | 4%                    | \$ 531,115    |
| 2022-23   | \$ 13,277,875      | 0%                    | \$ -          |
| <b>Year 1 - Calculation of Basic Operating Aid</b>                              |                    |                       |               |
| Assumption – Wheatland -Chili CSD Annexed by Rush-Henrietta CSD on July 1, 2008 |                    |                       |               |
| WCCSD 2006-07 Selected Operating Aid Per Pupil = \$1,972,276 (a)                |                    |                       |               |
| RHCSD 2006-07 Selected Operating Aid Per Pupil = \$11,305,599 (b)               |                    |                       |               |
| Combined 2006-07 Selected Operating Aid Per Pupil = \$13,277,875 (a+b)          |                    |                       |               |

**Table 29 (b) - Wheatland-Chili CSD and Churchville-Chili CSD Reorganization**

| Year   | Base Operating Aid | Incentive Aid Percent | Incentive Aid |
|--|--------------------|-----------------------|---------------|
| 2008-09 (Year 1)   | \$ 14,462,761      | 40%                   | \$ 5,785,104  |
| 2009-10  | \$ 14,462,761      | 40%                   | \$ 5,785,104  |
| 2010-11  | \$ 14,462,761      | 40%                   | \$ 5,785,104  |
| 2011-12  | \$ 14,462,761      | 40%                   | \$ 5,785,104  |
| 2012-13  | \$ 14,462,761      | 40%                   | \$ 5,785,104  |
| 2013-14  | \$ 14,462,761      | 36%                   | \$ 5,206,594  |
| 2014-15  | \$ 14,462,761      | 32%                   | \$ 4,628,084  |
| 2015-16  | \$ 14,462,761      | 28%                   | \$ 4,049,573  |
| 2016-17  | \$ 14,462,761      | 24%                   | \$ 3,471,063  |
| 2017-18  | \$ 14,462,761      | 20%                   | \$ 2,892,552  |
| 2018-19  | \$ 14,462,761      | 16%                   | \$ 2,314,042  |
| 2019-20  | \$ 14,462,761      | 12%                   | \$ 1,735,531  |
| 2020-21  | \$ 14,462,761      | 8%                    | \$ 1,157,021  |
| 2021-22  | \$ 14,462,761      | 4%                    | \$ 578,510    |
| 2022-23  | \$ 14,462,761      | 0%                    | \$ -          |
| <b>Year 1 - Calculation of Basic Operating Aid</b>                           |                    |                       |               |
| Assumption - Wheatland -Chili CSD Annexed by Churchville CSD on July 1, 2008 |                    |                       |               |
| WCCSD 2006-07 Selected Operating Aid Per Pupil = \$1,972,276 (a)             |                    |                       |               |
| CCCSO 2006-07 Selected Operating Aid Per Pupil = \$12,490,485 (b)            |                    |                       |               |
| Combined 2006-07 Selected Operating Aid Per Pupil = \$14,462,761 (a+b)       |                    |                       |               |

**Table 29 (c) - Wheatland-Chili CSD and Gates-Chili CSD Reorganization**

| Year   | Base Operating Aid | Incentive Aid Percent | Incentive Aid |
|--|--------------------|-----------------------|---------------|
| 2008-09 (Year 1)   | \$ 14,698,311      | 40%                   | \$ 5,879,324  |
| 2009-10  | \$ 14,698,311      | 40%                   | \$ 5,879,324  |
| 2010-11  | \$ 14,698,311      | 40%                   | \$ 5,879,324  |
| 2011-12  | \$ 14,698,311      | 40%                   | \$ 5,879,324  |
| 2012-13  | \$ 14,698,311      | 40%                   | \$ 5,879,324  |
| 2013-14  | \$ 14,698,311      | 36%                   | \$ 5,291,392  |
| 2014-15  | \$ 14,698,311      | 32%                   | \$ 4,703,460  |
| 2015-16  | \$ 14,698,311      | 28%                   | \$ 4,115,527  |
| 2016-17  | \$ 14,698,311      | 24%                   | \$ 3,527,595  |
| 2017-18  | \$ 14,698,311      | 20%                   | \$ 2,939,662  |
| 2018-19  | \$ 14,698,311      | 16%                   | \$ 2,351,730  |
| 2019-20  | \$ 14,698,311      | 12%                   | \$ 1,763,797  |
| 2020-21  | \$ 14,698,311      | 8%                    | \$ 1,175,865  |
| 2021-22  | \$ 14,698,311      | 4%                    | \$ 587,932    |
| 2022-23  | \$ 14,698,311      | 0%                    | \$ -          |
| <b>Year 1 - Calculation of Basic Operating Aid</b>                     |                    |                       |               |
| Assumption – Wheatland -Chili CSD Annexed by Gates CSD on July 1, 2008 |                    |                       |               |
| WCCSD 2006-07 Selected Operating Aid Per Pupil = \$1,972,276 (a)       |                    |                       |               |
| GCCSD 2006-07 Selected Operating Aid Per Pupil = \$12,726,035 (b)      |                    |                       |               |
| Combined 2006-07 Selected Operating Aid Per Pupil = \$14,698,311 (a+b) |                    |                       |               |

**Table 29 (d) - Wheatland-Chili CSD and Caledonia-Mumford CSD Reorganization**

| Year  | Base Operating Aid | Incentive Aid Percent | Incentive Aid |
|---|--------------------|-----------------------|---------------|
| 2008-09 (Year 1)  | \$ 5,331,183       | 40%                   | \$ 2,132,473  |
| 2009-10   | \$ 5,331,183       | 40%                   | \$ 2,132,473  |
| 2010-11   | \$ 5,331,183       | 40%                   | \$ 2,132,473  |
| 2011-12   | \$ 5,331,183       | 40%                   | \$ 2,132,473  |
| 2012-13   | \$ 5,331,183       | 40%                   | \$ 2,132,473  |
| 2013-14   | \$ 5,331,183       | 36%                   | \$ 1,919,226  |
| 2014-15   | \$ 5,331,183       | 32%                   | \$ 1,705,979  |
| 2015-16   | \$ 5,331,183       | 28%                   | \$ 1,492,731  |
| 2016-17   | \$ 5,331,183       | 24%                   | \$ 1,279,484  |
| 2017-18   | \$ 5,331,183       | 20%                   | \$ 1,066,237  |
| 2018-19   | \$ 5,331,183       | 16%                   | \$ 852,989    |
| 2019-20   | \$ 5,331,183       | 12%                   | \$ 639,742    |
| 2020-21   | \$ 5,331,183       | 8%                    | \$ 426,495    |
| 2021-22   | \$ 5,331,183       | 4%                    | \$ 213,247    |
| 2022-23   | \$ 5,331,183       | 0%                    | \$ -          |
| <u>Year 1 - Calculation of Basic Operating Aid</u><br>Assumption – Wheatland -Chili CSD Annexed by Caledonia-Mumford CSD on July 1, 2008<br>WCCSD 2006-07 Selected Operating Aid Per Pupil = \$1,972,276 (a)<br>CMCSO 2006-07 Selected Operating Aid Per Pupil = \$3,358,907 (b)<br>Combined 2006-07 Selected Operating Aid Per Pupil = \$5,331,183 (a+b) |                    |                       |               |

As the tables indicate, depending on the year, the newly formed district will receive up to an additional 40% of their combined 2007-07 Operating Aid per pupil, reduced 4% per year after five (5) years. The district can use the aid for any operating purpose (e.g., salaries and instructional materials). Additionally, as we demonstrate in the next section, the district can use all or a proportional share of the aid to provide property tax relief.

Local Sources

Districts secure local sources of revenue largely, though not exclusively, through property taxes. Like state sources, the amount that a district raises from property taxes is dependent on both community preferences and the wealth of the district. For example, New York’s wealthiest districts, in general, tax themselves at lower rates than do poorer districts. With regard to community preferences, in New York State, districts of equal wealth can choose through the budget process to raise different amounts of revenues locally for their schools.

Table 30 offers some insight into community preferences for raising local revenues for their schools among local districts. For example, WCCSD’s local property tax burden has ranked among the highest in Monroe County over the decade, and is the typically the highest among the merger candidates. Churchville-Chili demonstrates a similar, though somewhat lower level of tax burden than WCCSD, while Gates-Chili has been steadily lowering their relative burden throughout the decade. Rush-Henrietta consistently reports the lowest true-value tax rates in the county. This is partially a function of the high level of retail development in the Rush-Henrietta district. Caledonia-Mumford’s 2008-09 full value tax rate was \$18.73 – the lowest of the four partners considered for reorganization in this analysis.

**Table 30 – Monroe County True Value Tax Rates – Highest to Lowest**  
**(\$1 per \$1,000 of Full-Value, County Rank)**

| District          | 1998-99         | 1999-00                     | 2000-01         | 2001-02                      | 2002-03                      | 2003-04         | 2004-05                     | 2005-06         | 2006-07                     | 2007-08         |
|-------------------|-----------------|-----------------------------|-----------------|------------------------------|------------------------------|-----------------|-----------------------------|-----------------|-----------------------------|-----------------|
| Wheatland-Chili   | 18.28<br>(12th) | 19.74<br>(6 <sup>th</sup> ) | 20.43<br>(7th)  | 23.11<br>(5th)               | 25.38<br>(2 <sup>nd</sup> )  | 25.26<br>(3rd)  | 25.4<br>(3 <sup>rd</sup> )  | 25.24<br>(4th)  | 24.91<br>(5 <sup>th</sup> ) | 24.67<br>(5th)  |
| Rush-Henrietta    | 16.95<br>(16th) | 17.29<br>(17th)             | 17.19<br>(17th) | 17.74<br>(17 <sup>th</sup> ) | 17.74<br>(17 <sup>th</sup> ) | 19.88<br>(17th) | 19.95<br>(17th)             | 20.29<br>(17th) | 19.41<br>(17th)             | 18.96<br>(17th) |
| Churchville-Chili | 19.66<br>(6th)  | 20.66<br>(4th)              | 21.1<br>(6th)   | 22.17<br>(7th)               | 23.64<br>(6 <sup>th</sup> )  | 24.34<br>(5th)  | 24.65<br>(5 <sup>th</sup> ) | 24.69<br>(6th)  | 24.87<br>(6 <sup>th</sup> ) | 23.88<br>(8th)  |
| Gates-Chili       | 20.19<br>(3rd)  | 20.35<br>(5th)              | 21.67<br>(4th)  | 22.57<br>(6th)               | 23.39<br>(8 <sup>th</sup> )  | 24.11<br>(6th)  | 23.75<br>(9 <sup>th</sup> ) | 24.28<br>(10th) | 23.37<br>(10th)             | 23.63<br>(9th)  |
|                   |                 |                             |                 |                              |                              |                 |                             |                 |                             |                 |
| Brighton          | 18.38           | 18.70                       | 18.85           | 20.09                        | 21.08                        | 22.26           | 23.05                       | 24.29           | 24.70                       | 24.59           |
| Brockport         | 20.12           | 20.87                       | 22.07           | 23.25                        | 23.49                        | 23.86           | 23.83                       | 23.74           | 23.65                       | 23.50           |
| East Irondequoit  | 19.27           | 19.33                       | 21.53           | 23.60                        | 24.44                        | 23.49           | 26.03                       | 27.19           | 28.53                       | 29.34           |
| East Rochester    | 20.00           | 19.72                       | 20.00           | 20.91                        | 22.30                        | 23.63           | 24.57                       | 25.41           | 25.41                       | 25.78           |
| Fairport          | 18.46           | 18.78                       | 18.96           | 20.55                        | 20.75                        | 21.78           | 22.06                       | 22.81           | 21.54                       | 21.90           |
| Greece            | 17.89           | 18.51                       | 20.15           | 20.77                        | 22.05                        | 22.52           | 23.35                       | 24.65           | 22.94                       | 23.20           |
| Hilton            | 18.92           | 19.28                       | 19.50           | 20.72                        | 21.95                        | 22.06           | 23.17                       | 21.91           | 21.68                       | 21.53           |
| Honeoye           | 18.09           | 18.27                       | 18.57           | 20.09                        | 21.30                        | 22.56           | 23.13                       | 22.65           | 22.97                       | 22.97           |
| Penfield          | 21.93           | 22.22                       | 22.80           | 23.67                        | 24.82                        | 25.75           | 25.35                       | 24.85           | 25.40                       | 24.71           |
| Pittsford         | 19.08           | 19.63                       | 19.23           | 19.76                        | 21.03                        | 21.69           | 21.05                       | 22.17           | 21.93                       | 22.48           |
| Rochester         | 16.09           | 18.73                       | 20.14           | 22.11                        | 24.31                        | 24.71           | 24.58                       | 24.58           | 24.58                       | 24.33           |
| Spencerport       | 21.21           | 21.66                       | 24.06           | 25.57                        | 28.04                        | 26.95           | 27.79                       | 27.79           | 25.83                       | 25.25           |
| West Irondequoit  | 17.48           | 18.37                       | 17.87           | 18.99                        | 20.18                        | 21.40           | 21.57                       | 21.99           | 21.94                       | 21.25           |
|                   |                 |                             |                 |                              |                              |                 |                             |                 |                             |                 |
| County            | 18.94           | 19.53                       | 20.24           | 21.51                        | 22.70                        | 23.31           | 23.72                       | 24.03           | 23.74                       | 23.65           |

Source: Monroe County School Boards Association "Facts & Figures"  
 Note: Historical figures for Caledonia-Mumford CSD are not available

Table 31 is an indication of expenditures per district for the 2005-2006 school year. Wheatland-Chili at \$17,376 per pupil is second in the county to only East Rochester. This high expenditure per pupil was one of the factors that generated interest in this study. The study team recognizes that this data seems dated, but it is the latest state audited data available.

**Table 31 – 2005-2006 Expenditures Per Pupil**

| District           | Exp/Pupil |
|--------------------|-----------|
| Wheatland-Chili    | \$17,376  |
| Rush-Henrietta     | \$17,150  |
| Churchville-Chili  | \$12,979  |
| Gates-Chili        | \$14,104  |
| Caledonia-Mumford  | \$13,024  |
|                    |           |
| Brighton           | \$15,792  |
| Greece             | \$14,202  |
| East Irondequoit   | \$14,526  |
| West Irondequoit   | \$13,548  |
| Honeoye Falls-Lima | \$12,782  |
| Spencerport        | \$14,385  |
| Hilton             | \$13,148  |
| Penfield           | \$14,720  |
| Fairport           | \$12,742  |
| East Rochester     | \$18,012  |
| Pittsford          | \$15,326  |
| Rochester          | \$15,614  |
| Brockport          | \$13,769  |
| Webster            | \$13,634  |
|                    |           |
| New York State     | \$16,212  |

Given the varying levels of true-value tax rates among the districts, and the infusion of ORI aid, it is reasonable to assume that a merger between WCCSD and another district would alter residents' tax burdens. In *Tables 32 (a-c)*, we estimate the changes in tax rates that would result from a merger between WCCSD and the other districts using three different scenarios:

1. The new district uses all of ORI aid to expand their programs. That is, the new district does not use ORI to provide tax relief. We estimate these figures in the column – True Value Tax Rate without (w/o) Tax Relief.

2. The new district uses 1/2 of ORI aid to expand their programs, and 1/2 of ORI aid to provide tax relief. We estimate these figures in the column – True Value Tax Rate with 50% of ORI Aid Used for Tax Relief.

3. The new district uses 100% of ORI aid to provide tax relief. That is, the new district would simply combine current district spending – and not use ORI to expand the educational program. We estimate these figures in the column – True Value Tax Rate with 100% of ORI Aid Used for Tax Relief.

Because WCCSD's true-value tax rate exceeds that of the other districts, its residents can anticipate a reduction in their tax burden if merged with any of the districts. The greatest reduction would occur if WCCSD were to merge with Rush-Henrietta. WCCSD 2008-09 full-value tax rate is \$24.12/\$1,000 while Rush-Henrietta's is \$19.08/\$1,000. *Table 32(a)* reports that if these districts were to merge, depending on the level of ORI used to provide tax relief, true value tax rates for the combined district would range from \$19.58/\$1,000 to \$18.08/\$1,000.

WCCSD would experience smaller reductions in their tax burdens if the district merged with Gates-Chili and still smaller if they reorganized with Churchville-Chili. This is because existing tax burdens do not currently differ much among the districts (*see Table 29*).

In all cases, the reduction in tax burden is greatest the larger the percentage of ORI aid devoted to providing tax relief. However, as ORI phases out beginning in Year 6, tax burdens will rise proportionally, converging on the tax rate that would exist if the district devoted all of the ORI aid to expanding their education program. Of course, the level of dollars ORI aid provides to support the education program also decreases proportionally each year.

**Table 32 (a) - Wheatland-Chili CSD and Rush-Henrietta Reorganization**

| Year    | Incentive Aid | 1/2 Aid Tax Relief | Combined 2008-2009 Full-Value Base | Combined 2008-2009 Tax Levy | True Value Tax Rate w/o Tax Relief | True Value Tax Rate with 50% ORI Aid Used for Tax Relief | True Value Tax Rate with 100% ORI Aid Used for Tax Relief |
|---------|---------------|--------------------|------------------------------------|-----------------------------|------------------------------------|--|---|
| 2008-09 | \$5,311,150   | \$2,655,575        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 18.83  | 18.08   |
| 2009-10 | \$5,311,150   | \$2,655,575        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 18.83  | 18.08   |
| 2010-11 | \$5,311,150   | \$2,655,575        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 18.83  | 18.08   |
| 2011-12 | \$5,311,150   | \$2,655,575        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 18.83  | 18.08   |
| 2012-13 | \$5,311,150   | \$2,655,575        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 18.83  | 18.08   |
| 2013-14 | \$4,780,035   | \$2,390,018        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 18.90  | 18.23   |
| 2014-15 | \$4,248,920   | \$2,124,460        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 18.98  | 18.38   |
| 2015-16 | \$3,717,805   | \$1,858,903        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 19.05  | 18.53   |
| 2016-17 | \$3,186,690   | \$1,593,345        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 19.13  | 18.68   |
| 2017-18 | \$2,655,575   | \$1,327,788        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 19.20  | 18.83   |
| 2018-19 | \$2,124,460   | \$1,062,230        | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 19.28  | 18.98   |
| 2019-20 | \$1,593,345   | \$796,673          | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 19.35  | 19.13   |
| 2020-21 | \$1,062,230   | \$531,115          | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 19.43  | 19.28   |
| 2021-22 | \$531,115     | \$265,558          | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 19.50  | 19.43   |
| 2022-23 | \$0           | \$0                | \$3,541,320,599                    | \$69,334,989                | 19.58                              | 19.58  | 19.58   |

Wheatland-Chili 2008-09 Tax Levy = 8,492,514 (a)  
 Rush-Henrietta 2008-2009 Tax Levy = \$60,842,475 (b)  
 Combined 2008-2009 Tax Levy = \$69,334,989 (a+b)

Wheatland-Chili 2008-09 Full-Value Base = \$352,079,578 (a)  
 Rush-Henrietta 2008-2009 Full-Value Base = \$3,189,241,021(b)  
 Combined 2008-2009 Full-Value Base = \$3,541,320,599 (a+b)



**Table 32 (b) - Wheatland-Chili CSD and Churchville-Chili CSD Reorganization**

| Year    | Incentive Aid | 1/2 Aid to Tax Relief | Combined 2008-2009 Full-Value Base | Combined 2008-2009 Tax Levy | True Value Tax Rate w/o Tax Relief | True Value Tax Rate with 50% ORI Aid Used for Tax Relief | True Value Tax Rate with 100% ORI Aid Used for Tax Relief |
|---------|---------------|-----------------------|------------------------------------|-----------------------------|------------------------------------|--|---|
| 2008-09 | \$5,785,104   | \$2,892,552           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$20.91  | \$19.15   |
| 2009-10 | \$5,785,104   | \$2,892,552           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$20.91  | \$19.15   |
| 2010-11 | \$5,785,104   | \$2,892,552           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$20.91  | \$19.15   |
| 2011-12 | \$5,785,104   | \$2,892,552           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$20.91  | \$19.15   |
| 2012-13 | \$5,785,104   | \$2,892,552           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$20.91  | \$19.15   |
| 2013-14 | \$5,206,594   | \$2,603,297           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$21.08  | \$19.50   |
| 2014-15 | \$4,628,084   | \$2,314,042           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$21.26  | \$19.85   |
| 2015-16 | \$4,049,573   | \$2,024,787           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$21.44  | \$20.20   |
| 2016-17 | \$3,471,063   | \$1,735,531           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$21.61  | \$20.56   |
| 2017-18 | \$2,892,552   | \$1,446,276           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$21.79  | \$20.91   |
| 2018-19 | \$2,314,042   | \$1,157,021           | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$21.96  | \$21.26   |
| 2019-20 | \$1,735,531   | \$867,766             | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$22.14  | \$21.61   |
| 2020-21 | \$1,157,021   | \$578,510             | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$22.32  | \$21.96   |
| 2021-22 | \$578,510     | \$289,255             | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$22.49  | \$22.32   |
| 2022-23 | \$0           | \$0                   | \$1,643,640,502                    | \$37,257,487                | \$22.67                            | \$22.67  | \$22.67   |

Wheatland-Chili 2008-09 Tax Levy = 8,492,514 (a)  
 Churchville-Chili 2008-2009 Tax Levy = \$29,523,773 (b)  
 Combined 2008-2009 Tax Levy = \$69,334,989 (a+b)

Wheatland-Chili 2008-09 Full-Value Base = \$352,079,578 (a)  
 Churchville-Chili 2008-2009 Full-Value Base = \$1,291,560,924 (b)  
 Combined 2008-2009 Full-Value Base = \$1,643,640,502 (a+b)

**Table 32 (c) - Wheatland-Chili CSD and Gates-Chili CSD Reorganization**

| Year   | Incentive Aid | 1/2 Aid to Tax Relief | Combined 2008-2009 Full-Value Base | Combined 2008-2009 Tax Levy | True Value Tax Rate w/o Tax Relief | True Value Tax Rate with 50% ORI Aid Used for Tax Relief | True Value Tax Rate with 100% ORI Aid Used for Tax Relief |
|--|---------------|-----------------------|------------------------------------|-----------------------------|------------------------------------|--|---|
| 2008-09  | \$5,879,324   | \$2,939,662           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$22.45  | \$21.12   |
| 2009-10  | \$5,879,324   | \$2,939,662           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$22.45  | \$21.12   |
| 2010-11  | \$5,879,324   | \$2,939,662           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$22.45  | \$21.12   |
| 2011-12  | \$5,879,324   | \$2,939,662           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$22.45  | \$21.12   |
| 2012-13  | \$5,879,324   | \$2,939,662           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$22.45  | \$21.12   |
| 2013-14  | \$5,291,392   | \$2,645,696           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$22.58  | \$21.38   |
| 2014-15  | \$4,703,460   | \$2,351,730           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$22.72  | \$21.65   |
| 2015-16  | \$4,115,527   | \$2,057,764           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$22.85  | \$21.92   |
| 2016-17  | \$3,527,595   | \$1,763,797           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$22.98  | \$22.18   |
| 2017-18  | \$2,939,662   | \$1,469,831           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$23.12  | \$22.45   |
| 2018-19  | \$2,351,730   | \$1,175,865           | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$23.25  | \$22.72   |
| 2019-20  | \$1,763,797   | \$881,899             | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$23.38  | \$22.98   |
| 2020-21  | \$1,175,865   | \$587,932             | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$23.52  | \$23.25   |
| 2021-22  | \$587,932     | \$293,966             | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$23.65  | \$23.52   |
| 2022-23  | \$0           | \$0                   | \$2,203,944,954                    | \$52,415,818                | \$23.78                            | \$23.78  | \$23.78   |
| <p>Wheatland-Chili 2008-09 Tax Levy = 8,492,514 (a)<br/>                     Gates-Chili 2008-2009 Tax Levy = \$43,923,304 (b)<br/>                     Combined 2008-2009 Tax Levy = \$52,414,818 (a+b)</p> <p>Wheatland-Chili 2008-09 Full-Value Base = \$352,079,578 (a)<br/>                     Gates-Chili 2008-2009 Full-Value Base = \$1,291,560,924 (b)</p> |               |                       |                                    |                             |                                    |  |   |

**Table 32 (d) - Wheatland-Chili CSD and Caledonia-Mumford CSD Reorganization**

| Year   | Incentive Aid | 1/2 Aid to Tax Relief | Combined 2008-2009 Full-Value Base | Combined 2008-2009 Tax Levy | True Value Tax Rate w/o Tax Relief | True Value Tax Rate with 50% ORI Aid Used for Tax Relief | True Value Tax Rate with 100% ORI Aid Used for Tax Relief |
|--|---------------|-----------------------|------------------------------------|-----------------------------|------------------------------------|--|---|
| 2008-09  | \$2,132,473   | \$1,066,237           | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$19.97  | \$18.38   |
| 2009-10  | \$2,132,473   | \$1,066,237           | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$19.97  | \$18.38   |
| 2010-11  | \$2,132,473   | \$1,066,237           | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$19.97  | \$18.38   |
| 2011-12  | \$2,132,473   | \$1,066,237           | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$19.97  | \$18.38   |
| 2012-13  | \$2,132,473   | \$1,066,237           | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$19.97  | \$18.38   |
| 2013-14  | \$1,919,226   | \$959,613             | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$20.13  | \$18.70   |
| 2014-15  | \$1,705,979   | \$852,989             | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$20.29  | \$19.02   |
| 2015-16  | \$1,492,731   | \$746,366             | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$20.45  | \$19.33   |
| 2016-17  | \$1,279,484   | \$639,742             | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$20.61  | \$19.65   |
| 2017-18  | \$1,066,237   | \$533,118             | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$20.76  | \$19.97   |
| 2018-19  | \$852,989     | \$426,495             | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$20.92  | \$20.29   |
| 2019-20  | \$639,742     | \$319,871             | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$21.08  | \$20.61   |
| 2020-21  | \$426,495     | \$213,247             | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$21.24  | \$20.92   |
| 2021-22  | \$213,247     | \$106,624             | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$21.40  | \$21.24   |
| 2022-23  | \$0           | \$0                   | \$671,087,534                      | \$14,467,746                | \$21.56                            | \$21.56  | \$21.56   |
| Wheatland-Chili 2008-09 Tax Levy = \$8,492,514 (a)<br>Caledonia 2008-2009 Tax Levy = \$5,975,232 (b)<br>Combined 2008-2009 Tax Levy = \$14,467,746 (a+b) |               |                       |                                    |                             |                                    |  |   |
| Wheatland-Chili 2008-09 Full-Value Base = \$352,079,578 (a)<br>Caledonia 2008-2009 Full-Value Base = \$319,007,956 (b)                                   |               |                       |                                    |                             |                                    |  |   |

Tables 33 offers some insight into the tax rates that might follow if WCCSD were to merge with another district. However, we encourage readers of this report to use caution when using these figures to predict future results. Residents approve tax rates in light of economic conditions, their preference for various educational programs (e.g., pre-k), and the availability of resources from the state and federal sources – each of which changes over time. To illustrate this point we report in Table 33 the tax rates of several other New York districts that have merged over the years. As the figures indicate, some district’s pre-merger tax burdens have increased, while others have decreased. This is true regardless of the number of years since the merger took place and the percentage of ORI received.

**Table 33 - Effect of Previous Mergers on Tax Rates Over Time**

| DISTRICT      | Full-Value Tax Rate Per Thousand Pre-Merger | Average Full-Value Tax Rate Per Thousand Pre-Merger | Merger Effective July 1: | Number of Years After Merger | 2000 Full-Value Tax Rate Per Thousand | Number of Years After Merger | 2006 Full-Value Tax Rate Per Thousand |
|---------------|---|---|--------------------------|------------------------------|---------------------------------------|------------------------------|---------------------------------------|
| Edwards       | \$22.16                                     | \$19.40   | 1987                     | 13                           | \$8.19                                | 21                           | \$12.36                               |
| Knox          | \$16.63                                     |   |                          |                              |                                       |                              |                                       |
| Broadalbin    | \$14.10                                     | \$16.04   | 1987                     | 13                           | \$11.57                               | 21                           | \$11.87                               |
| Perth         | \$17.98                                     |   |                          |                              |                                       |                              |                                       |
| Cherry Valley | \$14.63                                     | \$16.01   | 1987                     | 13                           | \$13.21                               | 21                           | \$14.20                               |
| Springfield   | \$17.39                                     |   |                          |                              |                                       |                              |                                       |
| Jasper        | \$8.62                                      | \$10.10   | 1987                     | 13                           | \$12.95                               | 21                           | \$14.90                               |
| Troupsburg    | \$11.57                                     |   |                          |                              |                                       |                              |                                       |
| Danemorra     | \$27.45                                     | \$24.01   | 1988                     | 12                           | \$15.79                               | 20                           | \$19.71                               |
| Saranac       | \$20.56                                     |   |                          |                              |                                       |                              |                                       |
| Gilbertsville | \$21.94                                     | \$18.86   | 1990                     | 10                           | \$13.85                               | 18                           | \$16.24                               |
| Mt. Upton     | \$15.77                                     |   |                          |                              |                                       |                              |                                       |
| Cuba          | \$15.85                                     | \$18.21   | 1991                     | 9                            | \$12.05                               | 17                           | \$20.55                               |
| Rushford      | \$20.56                                     |   |                          |                              |                                       |                              |                                       |
| Campbell      | \$14.61                                     | \$18.39   | 1992                     | 8                            | \$9.29                                | 16                           | \$22.78                               |
| Savona        | \$22.16                                     |   |                          |                              |                                       |                              |                                       |
| Cobleskill    | \$12.34                                     | \$12.78   | 1993                     | 7                            | \$12.70                               | 15                           | \$18.85                               |
| Richmondville | \$13.21                                     |   |                          |                              |                                       |                              |                                       |
| Cohocton      | \$16.90                                     | \$17.33   | 1993                     | 7                            | \$11.13                               | 15                           | \$16.85                               |
| Wayland       | \$17.76                                     |   |                          |                              |                                       |                              |                                       |
| Waterloo      | \$14.11                                     | \$14.65   | 1994                     | 6                            | \$14.24                               | 14                           | \$21.65                               |
| Boarder City  | \$15.19                                     |   |                          |                              |                                       |                              |                                       |
| Allegany      | \$14.56                                     | \$15.81   | 1995                     | 5                            | \$11.79                               | 13                           | \$16.51                               |
| Limestone     | \$17.05                                     |   |                          |                              |                                       |                              |                                       |
| Angelica      | \$16.30                                     | \$17.23   | 1996                     | 4                            | \$11.98                               | 12                           | \$16.31                               |
| Belmont       | \$18.16                                     |   |                          |                              |                                       |                              |                                       |
| Cattaraugus   | \$18.93                                     | \$18.61   | 2000                     | -                            | -                                     | 8                            | \$17.17                               |
| Little Valley | \$18.28                                     |   |                          |                              |                                       |                              |                                       |

Source: Educational Services Associates, 2000; Western New York Educational Service Council, 2006; NYS ORPS Municipal Profile  
[http://www.orps.state.ny.us/cfapps/MuniPro/osc/oscMuniSchooltaxlevy.cfm?fiscalyr\\_ending=2007&distbegins=C](http://www.orps.state.ny.us/cfapps/MuniPro/osc/oscMuniSchooltaxlevy.cfm?fiscalyr_ending=2007&distbegins=C)

WCCSD residents and those of its potential partners have regularly supported their districts budget. *Table 34* demonstrates the relative level of support for district spending by reporting “yes” and “no” votes for the budget over the past several years.

**Table 34 - Budget Votes**

| Budget Year | Wheatland - Chili Voted Yes (%) | Rush-Henrietta Voted Yes (%) | Churchville - Chili Voted Yes (%) | Gates-Chili Voted Yes (%) | Monroe County Districts Voted Yes (%) | Caledonia-Mumford Voted Yes (%) | District Budgets Passed Statewide (Percent) |
|-------------|---------------------------------|------------------------------|-----------------------------------|---------------------------|---------------------------------------|---------------------------------|---|
| 08-09       | 71%                             | 67%                          | 70%                               | 57%                       | 61%                                   | 63%                             | 92%   |
| 07-08       | 66%                             | 68%                          | 67%                               | 59%                       | 60%                                   | 56%                             | 95%   |
| 06-07       | 61%                             | 64%                          | 65%                               | 61%                       | 61%                                   | 54%                             | 89%   |
| 05-06       | NA                              | NA                           | NA                                | NA                        | NA                                    | NA                              | 88%   |
| 04-05       | 68%                             | 68%                          | 61%                               | 75%                       | 62%                                   | 56%                             | 84%   |
| 03-04       | 67%                             | 63%                          | 59%                               | 69%                       | 61%                                   | 51%                             | 85%   |

Source: NYSED. [http://www.emsc.nysed.gov/mgtserv/budgeting/annual\\_vote\\_results.htm](http://www.emsc.nysed.gov/mgtserv/budgeting/annual_vote_results.htm)  
 NA = Data Not Available

We do feel compelled to note that although WCCSD true value tax rates are the 5<sup>th</sup> highest in Monroe County, they are not substantially above the county mean or most other Monroe County School districts. Indeed, at \$24.67 per thousand, WCCSD is only pennies higher than Brighton. Gates-Chili, which is ranked in the middle of the county at \$23.63 per thousand, is 4.4% lower than Wheatland-Chili. This is not to minimize the tax impact on the WCCSD community, only to point out that Wheatland is not substantially higher in true value tax rates than most of Monroe County.

*Expenditure Patterns*

As our review of the literature indicates, one cannot reasonably predict how a newly combined district will alter in programming and services. Such changes are peculiar to the set of district decision makers and combined community preferences that follow from the merger/annexation. We have thus far discussed how a merger/annexation might affect course offerings in a

previous section. Here will we simply note how spending might change in reference to commonly used expenditure categories.

As *Table 35* reports, the districts in question varying somewhat with regard to the percentage of spending devoted to certain activities. For example, WCCSD appears to spend slightly more on its Board of Education, central administration, and operations and maintenance than its counterparts. Based on the literature reviewed earlier, one might anticipate a reduction in the relative share of these costs due to “economies of scale” – that is operating a larger district and distributing these costs over a larger number of students. Alternatively, other costs such as debt service would rise if WCCSD were to merge/annex with Churchville-Chili, as would its miscellaneous costs if it merged with Rush-Henrietta, or its benefit costs if it merged with Gates-Chili.

An analysis of district spending patterns once revealed that, in general, expend resources in comparable ways (e.g., instruction, debt service) regardless of size, wealth, and location (rural or suburban). Thus, WCCSD might experience marginal or slight changes in the percent of resources devoted to specific activities, we would not anticipate large shifts in these patterns.

**Table 35 - Expenditure Patterns, 2005-06**

| District          | Board of Education | Central Administration | BOCES Instruction | Tuition | Instructional Salaries | Other Instructional Expenses | Operation and Maintenance | Benefits | Transportation | Debt Service | Misc   |
|-------------------|--------------------|------------------------|-------------------|---------|------------------------|------------------------------|---------------------------|----------|----------------|--------------|--------|
| Wheatland-Chili   | 0.76%              | 2.43%                  | 12.33%            | 1.46%   | 43.11%                 | 4.71%                        | 7.07%                     | 18.49%   | 4.91%          | 3.23%        | 1.49%  |
| Rush-Henrietta    | 0.24%              | 1.56%                  | 10.63%            | 1.40%   | 40.65%                 | 3.25%                        | 6.49%                     | 15.91%   | 5.36%          | 1.52%        | 12.98% |
| Churchville-Chili | 0.40%              | 1.71%                  | 14.25%            | 0.70%   | 42.08%                 | 4.20%                        | 6.25%                     | 16.29%   | 5.56%          | 6.91%        | 1.65%  |
| Gates-Chili       | 0.37%              | 1.57%                  | 11.13%            | 2.15%   | 44.64%                 | 3.71%                        | 5.84%                     | 21.71%   | 4.57%          | 1.53%        | 2.79%  |
| Caledonia-Mumford | 0.46%              | 2.24%                  | 7.46%             | 1.56%   | 43.39%                 | 4.37%                        | 6.18%                     | 14.29%   | 4.96%          | 8.02%        | 7.07%  |
| Brighton          | 0.26%              | 2.10%                  | 8.27%             | 0.84%   | 42.93%                 | 3.70%                        | 6.07%                     | 18.44%   | 4.47%          | 4.10%        | 8.83%  |
| Brockport         | 0.37%              | 1.57%                  | 11.13%            | 2.15%   | 44.64%                 | 3.71%                        | 5.84%                     | 21.71%   | 4.57%          | 1.53%        | 2.79%  |
| East Irondequoit  | 0.89%              | 1.79%                  | 3.56%             | 0.86%   | 42.45%                 | 3.95%                        | 7.07%                     | 16.48%   | 5.62%          | 12.15%       | 5.17%  |
| East Rochester    | 0.21%              | 3.07%                  | 12.97%            | 1.86%   | 37.81%                 | 3.68%                        | 6.35%                     | 16.66%   | 6.79%          | 6.82%        | 3.78%  |
| Fairport          | 0.25%              | 2.10%                  | 6.67%             | 1.51%   | 40.16%                 | 5.06%                        | 9.56%                     | 17.87%   | 4.58%          | 8.76%        | 3.48%  |
| Greece            | 0.28%              | 3.35%                  | 6.13%             | 0.62%   | 42.70%                 | 5.10%                        | 6.97%                     | 19.84%   | 3.93%          | 8.62%        | 2.48%  |
| Hilton            | 0.23%              | 2.09%                  | 8.11%             | 1.20%   | 39.77%                 | 3.57%                        | 6.07%                     | 17.79%   | 5.08%          | 8.56%        | 7.53%  |
| Honeoye           | 0.57%              | 1.66%                  | 5.47%             | 1.20%   | 43.70%                 | 4.25%                        | 5.75%                     | 19.08%   | 4.61%          | 11.52%       | 2.18%  |
| Penfield          | 0.57%              | 3.10%                  | 5.86%             | 0.95%   | 46.65%                 | 4.47%                        | 6.30%                     | 21.55%   | 3.64%          | 2.67%        | 4.24%  |
| Pittsford         | 0.22%              | 1.37%                  | 9.17%             | 0.91%   | 46.91%                 | 3.79%                        | 5.83%                     | 20.02%   | 4.25%          | 3.75%        | 3.78%  |
| Rochester         | 0.62%              | 4.00%                  | 13.84%            | 0.00%   | 31.12%                 | 6.50%                        | 4.50%                     | 14.57%   | 5.34%          | 10.93%       | 8.57%  |
| Spencerport       | 0.19%              | 1.62%                  | 7.05%             | 1.03%   | 44.71%                 | 4.77%                        | 7.26%                     | 20.02%   | 3.72%          | 7.93%        | 1.70%  |
| West Irondequoit  | 0.40%              | 1.71%                  | 14.25%            | 0.70%   | 42.08%                 | 4.20%                        | 6.25%                     | 16.29%   | 5.56%          | 6.91%        | 1.65%  |
| Webster           | 0.38%              | 1.43%                  | 1.17%             | 3.85%   | 45.62%                 | 6.63%                        | 5.79%                     | 17.21%   | 7.61%          | 4.56%        | 5.74%  |
| Monroe County     | 0.40%              | 2.12%                  | 9.00%             | 1.30%   | 42.32%                 | 4.40%                        | 6.40%                     | 18.33%   | 5.01%          | 6.22%        | 4.49%  |
| New York State    | 0.34%              | 1.54%                  | 3.83%             | 2.62%   | 44.90%                 | 6.55%                        | 6.67%                     | 19.87%   | 5.13%          | 6.29%        | 2.25%  |

(Percent of Total Expenditures)

Source: NYSED. <http://www.oms.nysed.gov>

The fiscal ramifications of a merger depend on how the Board of Education of the merged district chooses to utilize new state revenues. If the board puts most of the new revenues into tax reduction, the merged district will realize lower taxes, at least during the time they are receiving reorganization incentive aid. If they put the money into improved programs, it is likely that once reorganization incentive aid expires, local property taxes will increase to support the new programs. Of course, the improvement in program with little or no tax increase for the period of reorganization incentive aid is a substantial benefit.

The unknown is the impact of reorganization building aid. Inevitably, the new district, or the existing district if it did not reorganize, would be doing some capital project work over the next 15 years. Building bonds are usually at least 20 years. The impact of reorganization building aid could substantially reduce the district's debt service and local property tax support of that debt service over a period of many years.

Based on these data, we are comfortable making the following statement. **It is clear that merger allows financial benefit to both districts almost entirely as a function of incentive aid supplied by the state.** The key is that the benefit comes from the additional state aid. Though there may be some cost savings in a larger district, there is little to suggest that such savings accrue as a net benefit to the taxpayers.

#### The Budget Vote Tipping Point: Are Budget Defeats Inevitable?

WCCSD's comparably higher tax rate and per pupil spending levels invites inquiry into whether these figures will rise to such levels that local voters will no longer support the district's budget. Our analysis and other researchers, however, suggest that it is not clear whether tax and spending rates foster budget defeats. *Table 36*, for example, highlights by BOCES region the number of districts whose budget initially failed in 2006. The limited number of districts in most BOCES (i.e., sample size) thwarted our ability to conduct meaningful statistical analyses that would enable us to determine why a budget failed among component districts. However, our analysis of budget defeats using statewide results revealed no statistically significant differences between those districts whose budget passed and failed with regard to local effort or combined wealth ratio (CWR). That said, districts whose budget



failed did have significantly higher expenditures per pupil (\$18,162) when compared to districts whose budget passed (\$16,352).

In our view, Ehrenberg, Ehrenberg, and Smith (2004) conducted the most defensible investigation of district budget defeats in New York. Using data from 1969 to 1999, Ehrenberg, et al, found that changes in state aid do not predict budget passage nor do changes in the real value of property. Though they did not have data on tax rate increases between years, in short, the researchers could not point directly to any fiscal factors that, as a matter of course, would lead to budget defeats. However, they did find that voting down a budget in one year increases the likelihood that the budget will fail the following year. And, curiously, districts in which school board members have longer terms generally have greater success passing their budgets.

**Table 36 - 2006-2007 District Budget Votes by BOCES, MAY 16, 2006**

| BOCES                                   | PASSED | FAILED | % Passed |
|---|--------|--------|----------|
| Cattaraugus-Allegany-Eric-Wyoming BOCES | 21     | 0      | 100%     |
| Cayuga-Onondaga BOCES                   | 9      | 0      | 100%     |
| Champlain Valley BOCES                  | 17     | 0      | 100%     |
| Erie #1 BOCES                           | 19     | 0      | 100%     |
| Franklin-Essex-Hamilton BOCES           | 10     | 0      | 100%     |
| Jefferson... BOCES                      | 18     | 0      | 100%     |
| Madison-Oneida BOCES                    | 9      | 0      | 100%     |
| Monroe #1 BOCES                         | 10     | 0      | 100%     |
| Monroe #2-Orleans BOCES                 | 9      | 0      | 100%     |
| Onondaga-Cortland-Madison BOCES         | 23     | 0      | 100%     |
| Orleans-Niagara BOCES                   | 13     | 0      | 100%     |
| Oswego BOCES                            | 9      | 0      | 100%     |
| Otsego-Delaware-Schoharie-Greene BOCES  | 19     | 0      | 100%     |
| Suffolk BOCES - Western                 | 18     | 0      | 100%     |
| Delaware-Chenango-Madison-Otsego BOCES  | 15     | 1      | 94%      |
| Erie #2-Chautauqua-Cattaraugus BOCES    | 26     | 1      | 96%      |
| Genesee Valley BOCES                    | 21     | 1      | 95%      |
| Herkimer-Fulton-Hamilton-Otsego BOCES   | 11     | 1      | 92%      |
| Oneida-Herkimer-Madison BOCES           | 11     | 1      | 92%      |
| Questar III BOCES                       | 21     | 1      | 95%      |
| Rockland BOCES                          | 7      | 1      | 87%      |
| Schuylers-Chemung-Tioga BOCES           | 6      | 1      | 86%      |
| St. Lawrence-Lewis BOCES                | 17     | 1      | 94%      |
| Tompkins-Seneca-Tioga BOCES             | 7      | 1      | 87%      |
| Wayne-Finger Lakes BOCES                | 24     | 1      | 96%      |
| Broome-Delaware-Tioga BOCES             | 13     | 2      | 87%      |
| Hamilton-Fulton-Montgomery BOCES        | 13     | 2      | 87%      |
| Sullivan BOCES                          | 6      | 2      | 75%      |
| Steuben-Allegany BOCES                  | 11     | 3      | 79%      |
| Orange-Ulster BOCES                     | 14     | 4      | 78%      |
| Ulster BOCES                            | 4      | 4      | 50%      |
| Westchester BOCES                       | 23     | 4      | 85%      |
| Putnam-Northern Westchester BOCES       | 13     | 5      | 72%      |
| Washington...Essex BOCES                | 26     | 5      | 84%      |
| Capitol Region BOCES                    | 18     | 7      | 72%      |
| Nassau BOCES                            | 49     | 7      | 87%      |
| Dutchess BOCES                          | 4      | 9      | 31%      |
| Suffolk BOCES - Eastern                 | 38     | 12     | 76%      |

Source: Ehrenberg, R. A., R. G. Ehrenberg, and C. L. Smith (2004).

Why do school budget referenda fail? Educational, Evaluation, and Poli

To better inform our analysis, we interviewed three (3) superintendents who experienced budget vote failures in recent years. There was general consensus that the True Value Tax Rate itself is not a predictor of a budget defeat. Rather, a large spike in the tax rate from one year to the next is a better predictor. In addition, each of the superintendents we talked to agreed that a budget defeat is usually not about just the tax rate. In one (1) case, the defeat was about the efforts of a disgruntled member of the board of education who openly worked to defeat the budget. In another, the defeat was a reaction to an unpopular dismissal. These kinds of issues are more likely to surface in small districts such as Wheatland-Chili than in large districts. However, the district that has had the most difficulty in passing its annual budget is the county's largest non-city district, Greece, has one of the lower True Value Tax Rates. They also have a well organized community group which has opposed school budgets. The tax rate itself is not the best predictor of budget passage.

### **Other Considerations**

*Given the precipitous enrollment decline faced by the Wheatland-Chili Central School District, and the difficulty of consolidation, outsourcing through tuition or sustaining a program with a district enrollment of approximately 700 pupils, what other options are there for the children, community, faculty, and staff that are the Wheatland-Chili Schools?*

One possible answer is to somehow attract new development. Unless people promptly move out of their homes as soon as their children graduate from high school, the only way small communities can generate more students is to have more housing starts. The Genesee/Finger Lakes Regional Planning Council analysis of October, 2004 noted little new development planned in the Wheatland-Chili Central School District. Meanwhile, communities like Victor were booming almost entirely as a function of new housing. The 2000 Census noted a total of 2,496 households in the Wheatland-Chili Central School District. Of those, only 728 or 29% were households that included children under the age of 18. Indeed, of the total households in the Wheatland-Chili Central School District, some 1,516 or 61% were households of only one or two individuals. According to the census, 28.6% of households contained at least one person 60 years old or over, while 22% contained at least one person 65 years or older. Some 1,840 of the 2,486 households or 74% are owner occupied. District officials report that they know of

virtually no homes that have been abandoned. Thus, there is simply minimal availability of housing for new families within the Wheatland-Chili Central School District.

In June, 2008, study team members conducted a quick real estate search of availability with a Scottsville, New York address between \$100,000-300,000. The search yielded 19 possible homes, six (6) of which were associated with a “boomer” development with homes featuring only two (2) bedrooms. Thus a family desiring to move into the Wheatland-Chili Central School District has limited housing availability. Conversely, the same query for Victor, the fastest growing school district in the Monroe County area, generated 64 choices. The conclusion is straight forward. There is limited housing availability in the Wheatland-Chili Central School District. Houses tend to turn over slowly. The vast majority of households are owner occupied and people stay in their homes after children graduate. Without significant development, it is expected that in district enrollment will stabilize at at slightly over 600 students (see enrollment projections).

It can also be suggested that without the development of new and desirable housing, the number of middle class and upper middle class families choosing to move to the Wheatland-Chili Central School District will be diminished.

The issues surrounding development are not complex. Although the vast majority of Wheatland-Chili residents have the advantage of county water, only the Village of Scottsville and a small portion of the Town of Wheatland enjoy the benefits of sewer. Based on interviews with the Genesee/ Finger Lakes Planning Regional Council, one of the issues the community faces is the aging capacity of the village sewer treatment plan. There is currently discussion underway to ameliorate that situation even considering closing the plant and joining with Monroe County Pure Waters Authority for sewage treatment services. This would be a potential developmental asset to the Wheatland-Chili Central School District. We interviewed Rick Herman, Executive Director of the Rochester Homebuilders’ Association. He indicated that the first criteria for a community to experience significant home building is advanced infrastructure. Mr. Herman sees no real potential of broad development without the availability of sewers. If sewer treatment capacity is increased, the provision of sewer lines and hookups could make the community more desirable for development.

We also interviewed Jeffrey Morrell, President of Morrell Builders, one of the largest builders in the Rochester area. Mr. Morrell suggested that development in Greater Monroe County has focused on the southeastern portion of the county, into Ontario County. This is true, in part, because of the excellent arterials leading out of the city and fully developed infrastructure found in those communities. In addition, communities east and south of the City of Rochester have historically been amenable regarding zoning restrictions allowing builders to start the cycle of “move-up” buyers at advantageous price points. Mr. Morrell pointed out such trends in zoning have not continued in every community.

In the case of Wheatland-Chili, most of the town is currently zoned AR-2, requiring lot sizes of two (2) acres per home. That leads to single “builds” as compared to comprehensive development. We interviewed Terry Rech, building inspector for the Town of Wheatland and Village of Scottsville. Mr. Rech agreed that as long as sewers were an issue, there was little chance of the school district seeing significant development. He did agree that it was reasonable to project that if sewers were more widely available, there would be pressure to make the necessary changes in zoning to accommodate more development.

The Village of Scottsville is only 10.3 miles from the University of Rochester, the largest employer in the Rochester area. It is only 7 miles from Rochester Institute of Technology. State Route 380, the arterial leading to the City of Rochester, is a direct route with few traffic lights. There are no short-term plans to revamp Route 383, as that project is not on the current five-year New York state transportation improvement program list. However, according to G/FLRPC Executive Director David Zorn, given overall state objectives, it could be expected to rise to that level of attention within 10-15 years. Given current state cutbacks, that period may be longer.

In comparison, Victor, the fastest growing community in the area is 20 miles from the University of Rochester, using U.S. 490. Yet the contrast between Wheatland-Chili and Victor could not be starker. Does this mean that sewers are the answer? Rick Herman, of the Rochester Homebuilders’ Association is quick to caution that sewers are part of a solution to new development. He points to some communities that have fully developed infrastructure but

still see little housing development. The issue there is often either the local schools or property taxes or a combination of the two.

*What about other kinds of development including industrial development and retail development?*

Many assume that industrial development and retail development also add to a district's tax base. Industrial development, however, does not necessarily directly impact local school enrollment or even increase the tax base. New employment opportunities without more housing will not impact enrollment, though the opposite is not necessarily the case. More housing might attract families employed elsewhere in the region to the district. More employment opportunities alone might bring in workers who choose to live elsewhere.

Nor does industry always have a positive impact on the tax base. Often, new industry comes with an industrial development tax abatement package. In time these packages tend to expire, and of course the adjacent development that comes with industry can be significant. This is not to downplay the advantages of industrial development on a community. Without question, the region benefits tremendously from industrial development. However, industrial development specifically within the Wheatland-Chili Central School District may or may not have a significant impact on school operations. Monroe County works aggressively to attract industrial development and Wheatland-Chili benefits from that work. However, industrial development is also the area where local officials have the least influence. Wheatland-Chili can change its zoning and improve its infrastructure, but the decision to locate a major manufacturing facility is made by others, who are not likely to be overly influenced by local decisions.

Retail development does not necessarily come with tax abatement. As part of our study, we interviewed a senior development specialist with a national firm specializing in the development of "covered shopping spaces" of one million or more square feet, better known as malls. This individual did not want us to disclose his identity and we are obliged to honor that request. He suggested that Rochester is already "overdeveloped" as far as malls go and pointed to the fact that some properties have struggled in recent years. The best bet for retail development in the Wheatland-Chili area is a "power strip" project featuring a large department

store such as Target or Wal-Mart. These projects tend to generate other development around them including restaurants and smaller stores. Wal-Marts usually include a grocery store. Such projects add to the tax base and may contribute to enrollment in that shopping convenience is something homeowners seek. Noting the benefits of retail development, it should also be noted that some people prefer NOT to have big box stores in their community. Two (2) years ago there was a concerted effort to dissuade a major retailer from opening a store in Lima, NY. Lima is a community not unlike Scottsville. People are very happy living in their small village relatively close to the city without any of the trappings of city or even suburban life. How does the Village of Lima deal with its high school students? They consolidated with Honeoye Falls to form the Honeoye Falls-Lima (HF-L) Central School District in 1969. HF-L High School is one of the top ranked high schools in the nation.

In the final analysis, Wheatland-Chili, however, has several very substantial advantages when development is considered. First and foremost, two (2) of the largest and most stable employers in Monroe County, the University of Rochester and Rochester Institute of Technology are both convenient to the Village of Scottsville. Although Wheatland-Chili does not have some of the typical amenities found in other suburban communities, it has a quaint and rural character which, one would assume, would be appealing, especially to the growing academic communities found at both the U of R and RIT. Based on our discussions with developers, quaint and rural is very attractive to homebuyers. However, quaint and rural without sewers is not so appealing. There is no major grocery store in the Village of Victor, yet they have seen tremendous growth. Lima boasts solid property values and HF-L approaches 3,000 students. But neither the Village of Lima nor the Village of Honeoye Falls has lost its rural character.

We have provided a number of options to the WCCSD Board of Education and community. They could go along as they are, possibly add some on-line classes and expect to be able to offer a high quality program to their students. This is an expensive option, especially with a very small high school.

They could choose to reorganize, either by merging with another district or dissolving their high school and sending their students to a contiguous district on a tuition basis. Each of those options has a very substantial impact on the community, its students and faculty and staff.

Currently, infrastructure issues make it unlikely that the district will experience any large scale development.

In the final analysis, these issues must be decided by the Wheatland-Chili community. In the next section of this work, we report on our efforts to ascertain community reaction to the study and their input regarding direction for the district.



## **Section VII: Response to Question 3 Regarding Impact on the Community**

*How would each of those possible options (as identified in Question 2) impact the district programmatically, fiscally, and **community identity**?*

We offer Section VII separately from our work on the programmatic and fiscal impact of the various options investigated in this report. The study team has conducted a systematic process to ascertain public reaction to the findings of this report in order to guide the decision making process of the Wheatland-Chili Central School District Board of Education. In this section we discuss the process we used in conjunction with the district in disseminating the report, the team's approach to gaining public reaction and our analysis of that reaction.

*Public Dissemination of the Report:* The Wheatland Chili Central School District Board of Education and Superintendent were committed to an open and transparent process. It was their goal to disseminate the findings of the study to as many stakeholders as possible. On October 6, 2008, the study team met with the Board, the Superintendent and members of the administrative team to review the report for accuracy. The district then used its newsletter and web site to advertise a public meeting on the findings which was held on October 27 at the Wheatland Chili Elementary School. That meeting was attended by over one hundred (100) citizens. At that public meeting, study team members Brent, Lauver and Uebbing presented the full findings of the report and took all questions from the community. The next day the report, still in draft form, was published on the Wheatland-Chili Central School District web site.

*Gaining Public Reaction to the Report:* The district and the study team worked cooperatively to gain broad based reaction to the report and its findings. The district disseminated a feedback form for individuals who wished to submit reactions to the report in writing or on line.

The study team conducted a series of small group sharing sessions on November 17. Drs. Brent and Uebbing conducted small group sharing sessions with faculty and staff at the end of the school day. In the evening, a public session was held in the Middle School Gymnasium which was attended by approximately one hundred and fifty (150) individuals. At that session,

the team conducted an overview of the findings followed by five small group sharing sessions, each facilitated by a doctoral level facilitator.

The basis of the small group sessions was four questions suggested by the research findings.

These questions were submitted in advance to the Superintendent of Schools: The questions are as follows:

1. *The study demonstrates that it would be very difficult for WCCSD to offer a high school program as **broad** as that found in most other Monroe County school districts. However, the study also demonstrates that Wheatland-Chili's small size does not prohibit it from offering a high **quality** program as measured by student performance on state assessments. Do those findings lead you to want to investigate changing the structure of the district through reorganization or to maintain it?*
2. *The study suggests that a merger with another district could lead to broader program offerings for high school students. It also suggests that reorganization could lead to increased state aid which could result in substantially lower taxes for five years, with the increased aid eliminated over the subsequent ten years. Also, the state would provide up to 95% building aid for new construction. Does that finding make you want the district to investigate merger or to continue with the current school organization?*
3. *The study suggests that the district could save money by closing its high school and sending those students to one of the surrounding districts on a tuition basis. This could result in a substantial decrease in local school taxes and a more comprehensive education program for WCCSD high school students. However, it would mean the community would lose its high school. Does that finding make you want the district to investigate a tuition arrangement for Wheatland-Chili high school students or to continue with the current school organization?*
4. *The study suggests that WCCSD can be a high performing school district and could also broaden its current program through more aggressive use of "on-line" courses. Though this would not create tax reductions, it would broaden the comprehensive nature of the school's program for a relatively small cost. However, this is not possible unless the district continues to enjoy the support of residents on annual budget*

*referendums. Does this finding make you want to investigate an alternative structure or to maintain the current school district structure?*

In each instance, the facilitator read the question verbatim to the stakeholder group.

For each question the facilitator attempted to draw out public perceptions and reactions. These reactions were recorded by note takers in the room. The facilitators all have a background in qualitative research, and each contributed to the analysis of the small group dynamics and the general sense of the group for each question.

Finally, for those citizens who were not able to attend the open discussions on the report, the district continued to accept written feedback both through hard copy and on the web through mid December. It is the consensus of the research team that we were able to achieve a strong sense of the community through this process.

### **Community Reaction**

We present our analysis of community reaction to the report through several means. First we will present and discuss the results of the on-line survey and hard copy survey. As the questions in the two surveys are identical, the results will be combined. We will then present our analysis of the small group sharing sessions held on November 17. We will address community reactions to the various opinions presented in the report. We will also address what we heard to be concerns and support limits for the current organizational structure.

*Survey Results:* The district wanted to ensure broad participation in the discussion of available options. The study team prepared four questions to guide the small group discussions. The district extended those questions in a survey that could be completed on line or in paper format. Some 166 individuals responded to the survey. As noted in Table 37, there appears to be a strong desire to maintain the current Wheatland-Chili organization. Of the 166 respondents, only 34% answered positively to the first prompt, do the difficulties WCCSD experiences offering a **broad** high school program “lead you to want to investigate changing the structure of the district through reorganization or to maintain it?” Seventeen percent of the respondents were faculty and staff. Some of those individuals were also parents and residents, Almost 47%

of the respondents were parents and 43% were residents without children in school. The total (17%, 47% and 43%) exceeds 100% because faculty and staff are also counted, were appropriate, as residents with children in school.

**Table 37 Response to Survey Questions**

Percentage of Respondents

|                                  | Support investigating reorganization | Support investigating merger | Support investigating tuitioning | Support online courses etc. | Membership (total exceed 100% as some staff are residents and counted twice) |
|----------------------------------|--------------------------------------|------------------------------|----------------------------------|-----------------------------|--|
| Overall                          | 34                                   | 33                           | 30                               | 61                          |  |
| Parents                          | 33                                   | 21                           | 10                               | 60                          | 47   |
| Residents w/o children in school | 44                                   | 55                           | 48                               | 58                          | 43   |
| Staff                            | 25                                   | 25                           | 21                               | 68                          | 17   |

It should be emphasized that the prompts were all designed to promote both the advantages and disadvantages of the various choices. For example, the first prompt starts by pointing out the problems with the current structure, but then goes on to note that “Wheatland-Chili’s small size does not prohibit it from offering a high **quality** program as measured by student performance on state assessments.” (emphasis noted as illustrated in the actual question)

When asked about specific forms of reorganization, the respondents were slightly more positive about merger and less positive about tuitioning. Thirty three percent (33%) indicated an interest in merger while only 30% indicated an interest in tuitioning. Overall there is a fairly consistent 2-1 or better opposition to any kind investigation of reorganization.

A slightly different picture emerges when the survey data is disaggregated. There is much more interest in reorganization by residents *without* children in school than by parents. Of the respondents who identified themselves as residents without children in school, half or better had an interest in a specific form of reorganization, 55% in merger and 48% in tuitioning. The difference between parent perceptions and non-parent perceptions raises an important issue for

the Board of Education. According to the 2000 Census, there were 2486 total households in the Wheatland-Chili Central School District. Of those, 728, or 29%, were households with children. So while only 17% of the parents completing the survey expressed an interest in even investigating a merger, 55% of non-parents were interested in investigating a merger. If we extrapolate these numbers further, and assume that the number of survey takers is reflective of the full population, we find that 17% of the 2000 parent household proportion of 29% of the population is interested in an investigation of merger, or 5% of the total population. Further, 55% of the 71% of non-parent households are interested in an investigation of merger, or 39% of the total population. Added to the parent interest (5% + 39%) it may be extrapolated that 44% of the population would be interested in looking specifically at merger. That does not mean that 44% of the population wants to merge, only that they may be interested in a study.

The real question, of course, is to what extent do the online and paper survey results reflect the will of the general population? First, the 2000 Census may not be reflective of the Wheatland-Chili population today. Until a new census is completed in 2010, it will not be known what the proportion of households in the district are that contain and do not contain children.

Additionally an on-line survey for school issues is hardly an effective way to garner the perceptions of non parents. People without children are less likely to access the district's web site or to attend school meetings. Though the district did communicate the issues associated with the study in its newsletter, the participation of non parents in the on-line survey, given the 7-3 superiority of households without children suggests that the survey may not reflect the full views of the community. Indeed, the margin of error for non-residents is significant.

The online survey included an opportunity for extended comments. The district has made these comments available to the general public. We urge interested parties to read these comments as they provide a certain richness in understanding the feelings of the community. The comments are consistent with the concerns and opinions expressed in the small groups, which we investigate in the next section.

Finally, though we applaud the efforts of the district to solicit as much information as possible through the use of these on-line responses, these questions were designed to solicit discussion and feedback in small group sharing sessions, not to serve as a survey instrument. Though the

information is valuable in framing our view of overall community perceptions, it is not reflective of a rigorous survey which would be administered to a stratified random sample by trained researchers. A cursory review of the survey data suggests that any investigation of reorganization is a non-starter in the community. However, when the data is reviewed against the general population it is safe to say that parents are generally not interested in investigating reorganization, but the community as a whole has a greater interest and, given the margin or error suggested by the data, that interest could reflect a majority of the community.

*Focus Groups:* The team conducted a series of seven (7) small group discussions. Each of the discussions was facilitated by a member of the Warner School faculty with the exception of one which was facilitated by a former Brockport faculty member who is now a school principal. All of the facilitators hold doctorates and have experience in facilitation.

Two of the groups were made up of faculty and staff only. The other five groups were open membership. The first group was middle school and high school faculty and staff. The second group was elementary faculty and staff. These sessions were conducted on campus in afterschool meetings. Attendance was not required, but was encouraged by the Superintendent. In both of these sessions, the facilitator began with a brief summary of the findings of the report. The full report had been available to these groups and the general public for over a month. Each session lasted about an hour. In each of the two faculty and staff sessions, a professor facilitated the group, while a second professor took notes.

The format for the group sessions was always the same. Using the four questions noted earlier, the facilitator asked each question clearly, repeating it twice. The group members would respond and the facilitator would summarize the response to the satisfaction of the respondent. The note taker would record the response. If group members wanted to discuss issues not related to the question, the facilitator would steer the group back to the question. The facilitator would not answer extensive questions about the study once the group interaction began.

The faculty and staff were unanimous in their support for the existing structure. In subsequent discussions, we will break down group responses by question, but there is no need to do so when we discuss faculty and staff. A summary of their viewpoints is paraphrased as follows:

- Our current structure is working. Our students are doing well, in fact, better than they would do in a larger setting.
- Our small size allows us to build close, personal relationships with each child. We not only know their academic needs, but their psycho-social needs as well.
- We are able to offer highly individualistic, personal programs to our students.
- That closeness goes beyond the actual teaching experience. We see students we had in the elementary school go on to flourish in high school. We follow them through their school careers and beyond.
- It is much easier for our students to distinguish themselves in some way in a small school like ours. Likewise, it is harder for students to “hide” or fall through the cracks.
- We would not be wise to trust that there will actually be state funding for reorganization.
- We have made extensive improvements to our facilities and fields that might be wasted if we reorganize.
- If we lost the high school, that would be a serious blow to the community.

If the district choose either annexation or a tuitioning option, it is reasonable to assume that many Wheatland-Chili secondary faculty and staff would face a job loss. However that issue never surfaced in the secondary group and was only mentioned once in the elementary group. Both were reasonably well attended with approximately 30 at the secondary meeting and 20 at the elementary meeting.

To what extent can the responses of the faculty and staff be predicted as a function of job security? One of the options, centralization, would not pose a significant threat to job security. Yet, as with the other reorganization options, there was no support for centralization, despite the fact that centralization could actually present some career benefits to some teachers.

Faculty and staff would not be human if their objectivity was not somehow influenced by the threat that annexation and tuitioning presented to their livelihoods. However, it was the strong opinion of the analysts who facilitated and observed these sessions that the primary motivation of faculty and staff in opposing reorganization is captured in the bulleted statements listed above. Notwithstanding issues associated with job security, we believe that the vast majority of WCCSD staff opposed reorganization on its merits. It is also notable that in the online survey,

4 of the 24 staff who responded indicated an interest in exploring one of the reorganization options.

As noted, the online survey included an opportunity for extended comments. The district has made these comments available to the general public. We chose to include in this section the specific comments provided by the Wheatland-Chili Federation of Teachers:

*Thank you for taking the time to read this statement, and listening to our concerns. My name is Patricia Bruno and I'm a third-grade teacher here in the Wheatland-Chili School District. I am also president of the Wheatland-Chili Federation of Teachers, the union representing the caring and dedicated professionals who serve this community every day. After a great deal of discussion, the Wheatland-Chili faculty would like to offer some comments on the efficiency study that is part of the University of Rochester's look at whether consolidation makes sense for our district. I think you'll find our comments are relevant to the questions in the survey, even if they don't follow line for line. Let me start by stating the obvious. We are extremely fortunate to teach in a community with such terrific parents, who are supportive of our efforts as teachers in too many ways to count. We are also blessed to work with more than 700 wonderful young people each and every day. And, let me say that you – members of this outstanding community -- should be extremely proud of the highly skilled teachers who stand in front of classrooms in this school district every single day, helping to shape our regions future by guiding Wheatland-Chili's students to graduation; into college or the workplace, and to lives as successful adults. As teachers, we are proud of our record of accomplishment and high achievement by our students. It's a record of success we share fully with every parent, every volunteer, every administrator and every school board member. Together, we have built a successful school district... an entire village working together to raise its children. Now, it is also clear we are in difficult fiscal times. Teachers are property taxpayers, too, and we understand the burden placed on families by rising taxes. And, we understand the need to economize where possible, and to ensure our financial resources are not squandered. Consolidation may... I repeat, may... help save money. But, we ask, at what cost? How do you measure success? As teachers, we know it's more than dollars and cents? Where some see the small size of Wheatland-Chili as an impediment to efficiency, we see a small school community where every teacher knows virtually every student... and virtually every student knows every teacher, as an asset. We see a school community where children get lots of individual attention... not just when school is going well, but when academics... or just everyday life... presents a struggle. We are there for our students not only when a particular science lab or geometry problem has them vexed, but when a grandparent gets sick; when a parent loses a job; or when the furnace goes out on a cold winter night. Wheatland-Chili gives our high school students a chance to lead by being president of a school club or organization or captain of a sports team. They have more of an opportunity to shine in our music program, or in our school play. Will they get those same opportunities in a larger school district, where they will more likely be a number than a name and a face? What's the price tag on that? What's the price tag on seeing your students grow up to become parents, and to have their children in our classrooms as well? I've had that privilege, and let me tell you, it's amazing. In fact, I'm one of those. I grew up in this community and went to school here. I've been teaching here for more than 23 years, and my daughter is now in the high school. The T.J. Connor Elementary School*



*is named after my great uncle. I have a lot invested in Wheatland-Chili. We all do. As teachers, we believe we have more to lose by unraveling this school district, which is the fabric of our community, than we have to gain through a merger with a larger district. The very qualities that make this a special place in which to teach and in which to learn would be lost if Wheatland-Chili was absorbed by a larger school district. What would be the economic and social cost of that? That's not to say we can't economize. As teachers, we certainly can envision some sort of compromise that provides broader educational opportunities for children. We believe that sharing services... whether that is transportation, payroll, information technology or other business functions... with a larger school district, could, indeed, be a feasible way to be more efficient, while maintaining Wheatland-Chili's role as a community school district. Certainly, we should look more closely at distance learning and using BOCES programs to expand course offerings to students while protecting taxpayers from sudden, sharp increases. We are certainly open to exploring intermediate steps that save the district and taxpayers money, but fall short of a full merger or consolidation. In short, the Wheatland-Chili Federation of Teachers believes it's not all about dollars and cents. The factors that make this such a special place can not be measured by a survey. These intangibles must be a large part of the decision-making process. While we look for ways to save taxpayers money... and to enhance education programs... our first responsibility must be to the children and to our community. Thank you very much. Patricia Bruno WCFT President.*

There were many other comments, some brief and some extended. We chose to include Patricia Bruno's comments as she offered them in her role as WCFT President, thus reflecting the official position of the WCFT.

The organization of the community focus groups was slightly different. The community members in attendance filled the bleachers on one side of a half gymnasium. A team member gave a 30 minute presentation reviewing the major findings of the study. Again, an in-depth community presentation was provided the previous month. In addition, the district newsletter contained a summary of findings and the full study had been on the district web site for about a month. The group then followed one of five facilitators as per a color code randomly assigned. This should have resulted in five similar sized groups, but that was not the case. In fact, the group size varied from 18-30. We surmise that participants did not feel obligated to attend the session their color coded card suggested.

We will present the results of the small group sessions by question. This will mean some overlap, but we are convinced it provides the most comprehensive approach.

Question 1: *The study demonstrates that it would be very difficult for WCCSD to offer a high school program as **broad** as that found in most other Monroe County school districts.*

*However, the study also demonstrates that Wheatland-Chili's small size does not prohibit it from offering a high **quality** program as measured by student performance on state assessments. Do those findings lead you to want to investigate changing the structure of the district through reorganization or to maintain it?*

For much of the discussion, this was the crux of the issue. People were clear that their perceptions were that Wheatland-Chili students were not doing poorly as compared to contiguous districts, at least as measured by state assessments. Why then would the district want consider reorganization if only to broaden the program offerings? We present the comments of one of the analysts. His comments, which are presented here in their entirety, reflect the dominant themes of four of the five groups.

*The dominant theme...was that participants strongly favored attempts to maintain the current structure (i.e., keep their high school). Many participants indicated that they felt that without a local school, the community would suffer greatly in terms of housing prices, new business opportunities, and overall sense of community. Several participants even said they would put their own houses for sale right away if the decision were made to close the high school. While they acknowledged the budget problems the district has faced, there was a sense that the district and town council could do more to save this school and a lot of ideas were suggested. For example, several participants argued that the census data regarding projected enrollments could be misleading since the community was so old. These folks argued that younger families with children would soon be filling the larger houses that are now occupied by aging residents without children. Other residents argued that more could be done in the way of sharing courses and facilities with other bordering districts so their students could still have opportunities for coursework and extra-curricular activities. Other suggestions were to look to expand the urban program, where students from the city pay tuition to attend the school; to attempt to "redistrict" to bring in more students; and to consider cutting extra-curricular programs. Many said they would rather pay for art or music classes for their children on their own or drive them to participate in sports at other venues if it meant keeping their school. While no one wanted to see the high school maintained with poorly funded programs, virtually everyone felt that more could be done to save it. Most importantly, people just want to be very sure that every possibility for maintaining the school has been explored and they want to see data that points directly to the reasons why ideas such as the ones they suggested cannot work.*

There are a number of interesting comments that are contained in this summary.

Taken together, it seems as if some in the group would keep the school in the community at any cost, even to the point of paying for art and music themselves or driving to other venues to participate in athletics. There is almost a sense of denial,

that enrollment patterns are misleading and given time, things would improve. There is also a sense of hope that more could be done to broaden the program and decrease costs without reorganization. Among all the groups, there was concern about losing identity, and moving from the known to the unknown.

The notion of dominant theme is important here. Dominant does not mean unanimous. One group (which we will refer to as Group 5) included recent graduates who had gone on to competitive higher education experiences. They voiced concerns over the breadth and depth of advanced offerings currently available at Wheatland-Chili High School. There were also some residents who voiced concerns that the current school tax structure was making it very difficult for them to survive. At the end of the small group meetings, one resident protested to one team member that the questions were biased in favor of maintaining program. The team member responded by indicating that the questions, which had been screened in advance by school authorities, each contained a finding supporting reorganization and a finding supporting maintenance.

Another interesting theme that emerged in this group was the option of redistricting. This option was originally introduced at the October public meeting on the study. The notion here was to expand the Wheatland-Chili district by subsuming certain housing developments which are contained in another district but are much closer to Wheatland-Chili than to the other district's campus. We responded that such a redistricting would require the full cooperation of the two districts and that it was not within the purview of this study to inquire of other districts as to their interest in redistricting. However, we do feel compelled to comment briefly on this option.

There would be at least five significant components to redistricting. First and foremost, as in the other reorganization options explored in this work, the people affected would have to agree to the reorganization. We assume, at minimum, this would be the people changing districts. In the case of Rush-Henrietta, those citizens currently pay significantly lower school taxes than the people of Wheatland-Chili. There is no data that we know of indicating any unhappiness with any group in the

surrounding districts that would lead one to believe that they would be amenable to redistricting.

Second, we believe the board of education that was losing students and taxable value would have to agree with the redistricting. Districts have made significant investment in infrastructure and personnel based on their current size and projected growth. It does not seem logical that any district would agree to transfer a significant portion of their student base to another district, unless the people living in that area absolutely demanded it. Again, there is no evidence this is the case.

Third, we believe that if redistricting were to involve multiple supervisory districts, the District Superintendents would have to recommend the redistricting. Both Caledonia-Mumford and Rush-Henrietta are in supervisory districts different from Wheatland-Chili. There is no way to predict the viewpoints of the respective District Superintendents.

Fourth, the people of Wheatland-Chili would have to agree to the redistricting. Though this might be perceived to be a foregone conclusion, it is still an important component.

Finally, the Commissioner of Education would have to agree to the redistricting. Currently the policy of the New York State Education Department is to encourage reorganization through merger and annexation. That does not mean the Commissioner would not consider redistricting, only that it is not consistent with the current policy direction of the department.

It is our opinion that absent a strong commitment from the school district from which enrollment base would be transferred; there is little value in pursuing redistricting.

- *Question 2: The study suggests that a merger with another district could lead to broader program offerings for high school students. It also suggests that reorganization could lead to increased state aid which could result in substantially lower taxes for five years, with the increased aid eliminated over the subsequent ten years. Also, the state would provide*

*up to 95% building aid for new construction. Does that finding make you want the district to investigate merger or to continue with the current school organization?*

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Of the reorganization options, merger generated the most discussion and the most support, though not a majority in most groups. In fact the patterns among the five groups were similar to those noted in the general reorganization question. Among the most prevalent themes was a general lack of faith in the promise of New York State to actually deliver the promised incentive aid. This issue came up in every group. Another common issue was a lack of understanding of what merger actually meant for the district. Although this study outlines the law on district reorganization, many of the participants in the small groups were unfamiliar with the specific details, and voiced concern that they were being asked to render an opinion on something they did not understand. The facilitators tried to reassure the participants that the question was whether or not the district should *investigate* a merger, *not* whether or not the district should actually merge. Just the same, there was a sense of going from the known to the unknown, and that made people uncomfortable.

Notwithstanding that concern, there was an undercurrent in two of the groups that the district should investigate merger. Although we can not point to specific data, it was the feeling of analysts that these views were more prevalent among residents without children in school than parents of current students. There was also a sense that the strongest opponents were parents of younger children. It is entirely possible that if Wheatland-Chili merged with another district, elementary schools would not be significantly impacted. Again, we did not take identifying information from small group participants, but it did seem that elementary parents were particularly concerned about how moving to a larger district would impact their children. In one of the groups there was extended discussion about the psychological impact of moving from a smaller district to a larger district.

In Group 5, which was the group containing recent graduates who went on to competitive undergraduate experiences, there appeared to be a consensus that investigating merger made sense. We share the Group 5 analyst's remarks regarding this question:

*The individuals had a positive, yet guarded attitude about investigating their options. Most people are hopeful that there might be a way to influence people to move to the district so that they can keep the schools within WCCSD open. Some people thought that even in the event of a merger, they still might be able to keep their schools open and that*

*students from the other (merged) district might choose to attend their school. Others mentioned that even in the event of a merger, they would still have a voice and a sense of community. Some people thought that a merger with the Caledonia-Mumford School District was a more attractive option than others.*

*The major concerns addressed were what a merger might mean for teachers and for elementary students, who should not have to deal with the stresses of this type of change.*

*Very few people talked about their interest in decreasing their taxes. One person mentioned that we can no longer count on state aid or building aid as a “given” because of the changing economy in the state of New York.*

*One participant noted that it was important to look at \*Options to still have a voice. Merging will have a quality education for students. Opportunities will increase (Cal-Mum merger-kids may know some of those kids already). We will gain a community.*

In summation the analyst concluded “...that the majority would be willing to investigate, as long as each citizen has a ‘vote’ in the final decision.” What we do not know is how much the recent graduates influenced the group as a whole. We also did not notice recent graduates in the other groups with a strong impact on the overall group outcome.

*Question 3. The study suggests that the district could save money by closing its high school and sending those students to one of the surrounding districts on a tuition basis. This could result in a substantial decrease in local school taxes and a more comprehensive education program for WCCSD high school students. However, it would mean the community would lose its high school. Does that finding make you want the district to investigate a tuition arrangement for Wheatland-Chili high school students or to continue with the current school organization?*

From purely a business standpoint, tuitioning is the simplest of the reorganization options and has the least dependence on the state for continued funding. Our preliminary estimate suggests significant financial benefit for Wheatland-Chili, and this benefit is probably understated in the study. Yet this option received a generally unfavorable response from participants in the small groups.

The general trend was not unanimous. Several participants strongly supported the option. In one group a participant indicated that he had read the entire study carefully and that others needed to do so before passing judgment. A participant in another group indicated familiarity with the arrangement in the Wyoming Central School District and spoke to its

success. In one group, it was the opinion of the analyst that the participants were split on the issue, with half wishing to investigate further and the other half opting not to do so.

There was one group particularly opposed to this option. The analyst called the question a “non-starter”, noting that the participants were unanimous in their opposition to even investigating tuitioning. Others expressed fear about their children leaving a comfortable elementary experience and going on to a large middle or high school. There was also a fair amount of skepticism about the cost savings. There was an assumption that the analysis in the study failed to consider certain costs which the district would have to pay. One such cost which was brought to the attention of the group was the cost to parents and students to drive to the host high school for home sporting events. In fact, while we believe we included all district costs in our analysis, and present our work only as an invitation to further study and not as conclusive, we agree that we did not consider transportation costs for parents and students driving their personal vehicles to the host high schools for sporting events and other purposes, even daily attendance.

Overall, there seemed to be more tolerance for merger discussions than tuitioning. However, in both of these areas, we conclude that a lack of understanding on the part of some participants, a skepticism regarding the financial benefits and a sense of fear of the unknown all prohibited an in depth discussion as to the merits of the options.

*Question 4: The study suggests that WCCSD can be a high performing school district and could also broaden its current program through more aggressive use of “on-line” courses. Though this would not create tax reductions, it would broaden the comprehensive nature of the school’s program for a relatively small cost. However, this is not possible unless the district continues to enjoy the support of residents on annual budget referendums. Does this finding make you want to investigate an alternative structure or to maintain the current school district structure?*

There were generally positive, though mixed responses to the notion that a broader program could be provided through non-traditional means. Most of the groups were supportive of the idea of making more course offerings available to students. The secondary teacher/staff group, who might be expected to oppose the idea due to “unit work” provisions, was quite open to

examining how on-line classes and other approaches could help. One of the community groups was clearly supportive, if not enthusiastic. Yet two of the groups were skeptical. One raised serious questions about the efficacy of an on-line solution. The prevailing feeling in that group was that technology was not a viable solution for all students, as some are not likely to benefit. Group 5 expressed particular concerns. Here again, the experiences of the two recent graduates were important. Again, we present the excerpts from the analyst's comments.

*While the individuals in the group were generally receptive to distance-learning courses as a way to broaden the high school coursework, they were also concerned about the quality of these courses. Two recent graduates in attendance had taken an on-line health course at WCCSD and had a negative experience. The teacher facilitating the on-line course did not stay in regular contact with them or answer their questions. They and their friends were not fans of Accelerate U. They also complained that the "OWL" room was rarely open for use.*

*Parents mentioned that the relationships between teachers-students are so important. Teachers can often be mentors for their students and really inspire them to learn new things. They were worried that on-line coursework lacks such "inspiration," and that one can never substitute for a real teacher.*

This is not to suggest that the group was opposed to further investigation of this option. In fact all of the groups felt that finding ways to expand the curriculum through on-line classes, partnerships with colleges, even after school classes, made sense and should be investigated by the district. In one group there was a sense that reorganization should not be considered until such time that all of these options have been carefully considered by the Board of Education.

## **Taxes**

The true value tax rate in Wheatland-Chili is one of the highest in Monroe County, which means it is among the highest in the state, which means it is among the highest in the nation. Yet, true value tax rates are misleading. Consider a four bedroom center hall colonial in Scottsville, the identical house in Brighton and yet another identical house in an upscale Westchester County or Long Island Community. The Scottsville home might be assessed for \$180,000 generating just under \$5000 in school taxes. The same house in Brighton may well be assessed for \$300,000, generating close to twice the tax bill. In Westchester County or on Long Island, that house may well generate a school tax bill close



to \$20,000, depending on the district in which it is located. This is not to suggest that taxes are not an issue. They came up in the small groups and suggest a limit on tolerance for the current organization. Taken together, opinions in the various groups can be categorized into one of three clusters as follows:

- Taxes are not the issue. We need to preserve our schools.
- We can handle the taxes that we have now. As long as they do not go up too fast, we prefer our current schools. However, if they are going to jump too much, we would look at one of the options in the study.
- Taxes are too high. We need to consider one of the reorganization options.

We did not poll the participants on this issue. Based on responses to the questions about reorganization, however, it is apparent that a considerable majority of participants were in the first two groups. Only a small number of participants raised tax and cost issues. However the second group, the group that would be alarmed if taxes went up too fast, may represent a large proportion of the community. The point of course is that higher taxes seem to be a higher probability. On December 16, Governor Patterson proposed cuts in next year's state aid to schools that could result in a significant increase in local property taxes across the state. It is not clear where the tolerance among the Wheatland-Chili community will be for local school taxes in excess of \$30 per thousand in the near future.

## **Conclusion**

A number of conclusions can be drawn from our interactions with the Wheatland-Chili community. First and foremost, the vast majority of individuals with whom we interacted are happy with the educational program at Wheatland-Chili and do not want the school to change its structure. They acknowledge that the program is not as broad as the programs found in other Monroe County districts, but feel that the advantages of smaller size outweigh the benefits found in larger districts. Some residents, most specifically some recent graduates, made it clear that they feel that the program they received in high school did not fully advantage them when compared to their fellow students at highly competitive colleges. This was a small minority viewpoint, and we do not want to give disproportionate weight to the only

two recent graduates. However given the fact that these students have most recently experienced the full program at Wheatland-Chili and gone on to highly competitive colleges, their viewpoints are noted.

Many of the participants expressed a desire that the enrollment issue would solve itself, that people would realize what wonderful opportunities exist for children in the Wheatland-Chili district and simply make the choice to join the community. Our own interaction with the community leaves us wondering why more people have not made that very choice. We surmise that the lack of a wide choice in housing could be a significant part of the answer.

When the participants were offered choices that could both broaden program and reduce costs, they expressed skepticism and rejection. We emphasize that we did not ask participants to actually adopt these choices, only if they felt the district should investigate such choices. Overall, the choice to investigate reorganization was rejected by the participants by a ratio ranging from 2-1 to 7-3, depending on how the question was posed.

Skepticism was largely based upon the savings advantages or increased revenues we projected in our analysis. Interestingly, as school districts around the state deal with proposed cuts in aid as presented by Governor Patterson, incentive operating aid and incentive building aid have not been eliminated. As we note in the study, any district that chooses to reorganize during a period in which the incentive aid program is in effect, should, in all likelihood, receive the full amount of incentive aid promised. However, the state could choose to eliminate the program thus locking out districts that are contemplating reorganization but have not yet done so.

The second major factor among those who choose not to investigate any reorganization option was satisfaction with the current school district. Simply stated, these participants see no compelling reason to change. Not only do they not see reorganization offering improvements, but they believe that the new structure would be inferior to what they currently enjoy.

If the larger community was strongly against investigating reorganization option, faculty and staff were even stronger. In our focus groups with faculty and staff, we found no interest in investigating any of the alternatives except expansion of on-line courses. In the on-line survey

results, about one in four faculty and staff who responded indicated an interest. It is our opinion that in small communities, faculty and staff are critical in forming public opinion. Strong opposition to reorganization would make it difficult to realize a successful vote. Given that reality, the only reorganization option which seems possible is centralization, and only if faculty and staff can come to see it as a benefit. Again, we emphasize that we did not sense the prevailing concern on the part of the faculty and staff to be job security, although that certainly had to be a factor. Our analysis is that faculty and staff genuinely believes that what they have been doing is highly beneficial to students, and sees no compelling reason to change.

Despite the apparent majority view that no change is warranted, a substantial number of individuals believe that the district should go forward with an investigation of available options. About half of the survey respondents who do not have children in school favor looking more deeply into options. This is significant, as according to the 2000 census, only 29% of district households have children. Given the steep enrollment declines over the past eight years, that number could actually be close to 25% today. As indicated earlier in this report, the percentage of the community wishing the board to go forward with an investigation of one or more of the options identified could be close to 50%. Of course, in order to actually reorganize, more than 50% of the community would have to vote for a change and it is clear to us that there would have to be significant shifts in public opinion before that could happen.

In summation, while the Wheatland-Chili Central School District faces serious challenges due to declining enrollment, it does not appear that the majority of the population favors investigating any specific reorganization plan at this time. The only option that enjoyed widespread support was using non traditional approaches to broaden the curriculum.

## **Section VIII: Summary and Recommendations**

In summary, the study team presents the following findings and recommendations.

**Finding 1:** The Wheatland-Chili Central School District has experienced significant enrollment decline. Based on the Cohort Survival Model, that trend will continue. Different models yield different results, but it is likely that within five (5) years, Wheatland-Chili will have between 600 and 700 students enrolled in its school program.

**Finding 2:** The educational program offered to Wheatland-Chili students through eighth grade is comparable to that found in contiguous districts.

**Finding 3:** The educational program offered to Wheatland-Chili students in grades 9-12 has fewer choices than the programs found in contiguous districts.

**Finding 4:** Student outcomes at Wheatland-Chili as measured by state assessments are comparable to contiguous Monroe County districts.

**Finding 5:** There are districts with wealth measures and enrollment similar or below Wheatland-Chili that are designated as high performing district by the New York State Education Department.

**Finding 6:** Low enrollment does not prohibit the Wheatland-Chile Central School District from performing at high levels as measured by state assessments.

**Finding 7:** If the Wheatland-Chili Central School were to reorganize through centralization or annexation, the reorganized district would benefit from state incentive operating aid. This increase in operating aid could be used to decrease taxes, improve program or some combination of the two. Over time, this enhanced aid would decrease and end after 15 years.

**Finding 8:** If the Wheatland-Chili Central School were to reorganize through centralization or annexation, the reorganized district would benefit from state incentive building aid. This increase in aid could be used to construct new school buildings with substantially increased state participation. Up to 95% of approved costs would be provided by the state.

**Finding 9:** If the Wheatland-Chili Central School District were to close its high school and send its high school students to other schools on a tuition basis, the district could realize substantial cost savings. However, there are significant issues which would have to be resolved both with the receiving school and the Wheatland-Chili community.

**Finding 10:** The Wheatland-Chili community is supportive of the current school structure. Faculty, staff and parents demonstrate a strong preference not to investigate alternative structures. Residents without children in school appear to be split as to their preference.

**Finding 11:** The Wheatland-Chili community is supportive of efforts to provide a broader educational program through non-traditional approaches, including but not limited to, on-line classes and articulation agreements with area colleges.

**Recommendations:** When the study team began this project, it was not our intention to make recommendations. We felt the facts would speak for themselves and it was the sole purview of the governance team to consider their options. This study was originally commissioned in early 2008. Since that time, there have been profound changes in the global economy. There was little talk of an economic slowdown in January of 2008. We are now dealing with a deep recession. The Governor of the State of New York proposed massive budget cuts, including cuts in school aid. Wheatland-Chili faces a proposed cut in state aid of 7%. Assuming it costs at least 5% more to keep local programs running at their current levels, Wheatland-Chili could be facing a substantial local tax increase. Given their comparatively high true value tax rates, the district could experience significant reduction in program. It is likely that this is the first of

several years of difficult times. In that light, we return to the original question posed in this study:

Can the Wheatland Chili Central School District, with a student population of approximately 700 provide a comprehensive K-12 program in Monroe County over the next decade that is fiscally sustainable?

We studied the performance of other districts with smaller enrollments and less wealth and found that indeed, with fewer students and less wealth, districts had demonstrated high performance as measured by student achievement on state assessments. However, what has happened in the past may no longer be an indicator of the future. We suspect that in fact, the Wheatland-Chili district may have to deal with a student population of less than 700 students, perhaps close to 600 students. We further suspect that reduction in state aid, without an increase in the tax base, could result in substantial increases in local property taxes and a reduction in the quality of program the district offers to its students.

The strength of the Wheatland-Chili Central School District and its weakness are the same, small size. The district manages to provide a comprehensive program in an intimate setting. Class sizes are small and teachers are able to establish close working relationships with parents and students. Although the program is not as broad at the high school level, there is little evidence to indicate that students receive an educational program that is deficient, with the possible exception of advanced standing classes at the high school level. If, however, reductions in state aid result in broad based cuts in the educational program, the overall quality of the program would decrease. Class sizes could increase sharply. Non-mandated programs could be eliminated. That would change the premise of the district. A small but comprehensive program in an intimate setting would be replaced by an even smaller, deficient program in overcrowded classrooms.

We believe that the Board of Education and Superintendent of the Wheatland-Chili Central School District were wise in undertaking this study at precisely this time. The governance team now knows its options. They can watch enrollment and revenue trends carefully and continue to work to achieve the mission of the district, which is as follows:

The Wheatland-Chili Central School community is committed to academic excellence which empowers all individuals to become motivated learners and challenges them to excel as citizens in a global society.

At some point, however, it may become apparent the basic mission of the district can not be sustained. We emphasize the speculative nature of enrollment projections. The Rochester area is not positioned for population growth, and within the region, Wheatland-Chili has particular challenges. The models we used to project enrollment may not be sensitive to the changing population trends. A combination of declining enrollment and increasing local property taxes may make it impossible to meet the mission of the district.

At this time, the Board of Education of the Wheatland-Chili Central School District has studied this issue without knowing if other districts would be interested in the event the district wished to formally study one of the options presented in this study. Therefore, we make the following recommendations:

**That the Board of Education study the report carefully and ascertain which option would be most beneficial to the Wheatland-Chili Community.**

**That the Board consider preliminary discussions with one or more contiguous district governance teams to ascertain if there is interest in investigating one of the options presented in this study.**

**That if the Wheatland-Chili community can not support its basic educational mission in its current structure, the Board investigate one of the options presented in this study.**

We are not recommending that the district initiate a formal inquiry into any of the options presented in this study at this time. However, if the dual threat of continuing enrollment declines and an increased local tax burden makes it impossible to sustain the mission of the district, the Board of Education will have put itself in a position to move forward on reorganization options. Which option, including maintaining the status quo, would be the sole purview of the Board of Education and community. We can say that the option that appears to have the least impact on faculty and staff, and may in fact have the greatest overall beneficial effect, is centralization.

We end with our compliments to the Wheatland-Chili school community. We were most impressed by the pride, even affection, parents and community members have for their schools. The school district is fortunate to have a visionary Board of Education and Superintendent. We found thoughtful, loyal staff who were proud of the program they helped create. Parents and community members reflected a deep pride in their school, its students and their accomplishments. We met engaging students, committed community members and skillful leaders. Wheatland-Chili has the key ingredient for success regardless of its choice...outstanding people.

Respectfully submitted

Dr. Brian Brent

Dr. Sherri Lauver

Dr. Stephen Uebbing

Endnote

***What should the community expect now that the final study is complete?***

*Now that the final report has been presented to the Board of Education, the Board will begin a period of deliberation and discussion as to what steps, if any, they should now take. If the Board chooses to investigate some form of reorganization, then a second study team should be formed to conduct a deep study of the proposed action. Obviously, the first step would be to ascertain interest on the part of the other district(s). The specific reorganization study would include a comprehensive analysis of program, staff, facility, transportation, and financial condition.*

*It should again be emphasized that at this point, the Board has not approached another district regarding reorganization. This study provides an information base to the Board of Education and community. Subsequent actions need to be decided by the Board of Education and community.*



## About the Authors

**Dr. Brian Brett** has broad research and practical experience in school finance, is widely published, and is seen as one of the preeminent experts on school finance in the state. Dr. Brent is Chairman of the Leadership Department at the Warner School and Associate Dean.

**Dr. Sherri Lauver** is a program evaluation expert, having completed program analysis of public and private schools throughout the nation. The professional credentials of the study team are attached as an appendix.

**Dr. Stephen Uebbing** has extensive experience in school district leadership having spent 23 years as a Superintendent. Since 2006, Dr. Uebbing has served as a professor at the University of Rochester.

The study team wishes to express its appreciation to Superintendent Thomas Gallagher, the Board of Education of the Wheatland-Chili Central School, Suzanne Spear of the NYSED, all of the individuals who consented to interviews, each of the school districts that provided comparative information, and the faculty, staff and community members who provided their thoughts, perceptions and feedback.

Appendix A

**Wheatland-Chili  
Central School District  
Reorganization Study:**

**Comprehensive Program Evaluation Survey  
for  
Assistant Superintendents of Instruction**

**Stephen Uebbing, Ed.D  
Brian Brent, Ph.D.  
Sherri Lauver, Ph.D.**

Please note: The purpose of this survey is for me to give you a sense of the types of questions I will ask you during our meeting. It is not necessary for you to complete this survey.

For the purposes of this survey, we'd appreciate if you'd follow the following format:

- Elementary** school refers to students in grades PreK – 5.
- Middle** school refers to students in grades 6 - 8.
- High** school refers to students in 9 – 12.

If you have any questions or concerns about this survey, please feel free to email Sherri Lauver at [slauver@warner.rochester.edu](mailto:slauver@warner.rochester.edu) or call 585/355-8506 (mobile).

1a. Does your district offer a Universal Pre-Kindergarten (UPK) program?

- Yes  
 No             *GO TO 2a*

1b. How many pre-kindergarten students were enrolled in the program in the 2007-08 school year?

\_\_\_\_\_ (# of students)

2a. Does your district offer a kindergarten program?

*Please include regular kindergarten as well as transitional kindergarten and transitional first grade, if offered.*

- Yes  
 No             *GO TO 3a*

2b. How long is the school day for a kindergarten student?

- Full day (4 hours or more per day)  
 Half day (less than 4 hours per day)  
 Both offered

3a. Do you have any magnet schools in your district?

(A magnet program offers enhancements such as special curricular themes or methods of instruction to attract students from outside their normal attendance area.)

- Yes  
 No             *GO TO 4*

3b. **If yes**, please name the school and provide a 1-2 sentence description:

4a. Does your school district offer any of these special programs:

4b. Programs with special instructional approaches  
(e.g., Montessori, self-paced instruction, open education, ungraded classrooms, etc.)

- Yes  
 No

**If yes**, please provide short description:

4c. A program in which at least half of the core subjects are taught in a foreign language  
(A foreign language immersion program)

- Yes
- No

4d. Advanced placement (AP) courses for college credit

- Yes
- No

**If yes, please list courses:**

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4e. Distance learning course(s)

(Taught primarily via television, satellite, Internet, or e-mail)

- Yes
- No

4f. Alternative, Stay-in-School, or Dropout Prevention Programs for **MIDDLE** school students

- Yes
- No

4g. Alternative, Stay-in-School, or Dropout Prevention Programs for **HIGH** school students

- Yes
- No

4h. Other special programs you'd like us to know about for **MIDDLE** school students (please list; use back side of page too):

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4i. Other special programs you'd like us to know about for **HIGH** school students (please list; use back side of page, too):

5a. Does your district offer an extended day program providing instruction beyond the normal school day for students who need academic assistance?

Yes (Please indicate grade levels:

\_\_\_\_\_)

No

5b. Does your district offer any SUMMER school activities for students enrolled in this school who need **ACADEMIC ASSISTANCE**?

Yes

No

5c. LAST summer (2007) or this school year (2007-08), were summer school activities or academic intersessions provided for students enrolled in this school who sought **ACADEMIC ADVANCEMENT OR ENRICHMENT**?

Yes

No

6a. Does your district offer before-school or after-school day care programs for **ELEMENTARY** students?

Yes

No

6b. Does your district offer any after-school programs for **MIDDLE** school students?

Yes

No

7. THIS school year (2007-08), did your district use the following methods to organize most classes or most students in any of your schools?

7a. Grades subdivided into small groups such as “houses” or “families”  
 Yes (Which schools? \_\_\_\_\_)

No

7b. Student groups that remain two or more years with the same teacher (e.g., looping)  
 Yes (Which schools? \_\_\_\_\_)

No

7c. Multi-age grouping  
(Most students normally in different grades placed together)  
 Yes (Which schools? \_\_\_\_\_)

No

7d. Block scheduling  
(Class periods scheduled to create extended blocks of instruction time)  
 Yes (Which schools? \_\_\_\_\_)

No

8a. In what grade do you begin offering foreign language instruction?

6

7

8

Other: \_\_\_\_\_

8b. What languages are offered to **MIDDLE SCHOOL** students?

- French
- Spanish
- German
- Latin
- Japanese
- Russian
- Italian
- Mandarin Chinese
- Other: \_\_\_\_\_

8c. What languages are offered to **HIGH SCHOOL** students?

- French
- Spanish
- German
- Latin
- Japanese
- Russian
- Italian
- Mandarin Chinese
- Other: \_\_\_\_\_

9. Are the following opportunities available for **HIGH SCHOOL** students?

- Dual or concurrent enrollment that offers both high school and college credit funded by the school or district?
- Yes
- No
- Career and technical education courses (These include courses on topics such as agriculture, business, computer science, health care, public and consumer services, communications, construction, engineering, manufacturing, repair, science, or transport technologies.)
- Yes
- No
- Work-based learning or internships outside of school, in which students earn COURSE CREDITS for supervised learning activities that occur in paid or unpaid workplace assignments
- Yes
- No

- Specialized career academy (Curriculum organized around a specific career area such as health, hospitality, IT)
- Yes
- No

10a. Of the students enrolled in your district, how many students have an Individual Education Plan (IEP) because they have special needs?

\_\_\_ # of students

10b. Does your school have a Student Support Team (SST), whose mission it is to SST provide a place to strengthen and support students who are having difficulty in the school environment? The SST is part of the regular education environment.

- Yes
- No

10c. Do you offer a 6-1-1 option for special education students in your district?

- Yes
- No

10d. Do you offer a 12-1-1 option for special education students in your district?

- Yes
- No

10e. What other teaching models do you have available in-district for special education students?

- Resource room support
- Co-teaching
- Other (please specify: \_\_\_\_\_)

10f. How many students with disabilities are in each of the following instructional settings in your **ELEMENTARY** schools?

- All day in a regular classroom (100 percent of the school day)
- Most of the day in a regular classroom (75 percent of the school day)
- Some of the day in a regular classroom (50 percent of the school day)
- Little or none of the day in a regular classroom (25% or less of the school day)

10g. How many students with disabilities are in each of the following instructional settings in your **MIDDLE** schools?



- All day in a regular classroom (100 percent of the school day)
- Most of the day in a regular classroom (75 percent of the school day)
- Some of the day in a regular classroom (50 percent of the school day)
- Little or none of the day in a regular classroom (25% or less of the school day)

10h. How many students with disabilities are in each of the following instructional settings in your **HIGH** schools?

- All day in a regular classroom (100 percent of the school day)
- Most of the day in a regular classroom (75 percent of the school day)
- Some of the day in a regular classroom (50 percent of the school day)
- Little or none of the day in a regular classroom (25% or less of the school day)

11. What kind of transition services do you provide to help special education students either plan for college or the workplace? (You may use the back side of the page too.)

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12a. Of the students enrolled in your district in the 2007-08 school year, have any been identified as limited-English proficient? (Limited-English proficient (LEP) refers to students whose native or dominant language is other than English and who have sufficient difficulty speaking, reading, writing, or understanding the English language as to deny them the opportunity to learn successfully in an English-speaking-only classroom.)

- Yes
- No

13. Does this school require limited-English proficient students to pass a test of English language proficiency to complete its limited-English proficient program?

- Yes
- No

14. Are limited-English proficient students in this school administered assessments at least once per year to determine their level of English language proficiency?

- Yes
- No

15. Do your schools' library media centers have any paid state-certified library media specialists?

Elementary

- Yes
- No

Middle

- Yes
- No

High

- Yes
- No

16. Is there an enrichment program for the students in your elementary schools?

- Yes

(Which grades? \_\_\_\_\_)

- No

17. What subjects does the gifted and talented program cover?

Math

Science

English/Literature

Social Studies

Foreign Language

Computer Science

Music

Art

Other (please specify): \_\_\_\_\_

18. Does gifted and talented instruction take place primarily within your school/school building, or primarily outside it (for example, at another school)?

- Inside the school building
- Outside the building or at another school

19. Which of the following statements best describes the way gifted and talented instruction is organized for the students in your elementary schools?

Circle one choice below.

Students are taken from their regular classes for supplemental gifted and talented instruction

1

- GNT students are grouped together for all or most subjects and have their own curriculum 2
  - GNT students are given enriched instruction only in the particular subjects in which they excel 3
  - GNT students are given supplemental instruction within their own classroom 4
  - Combination of above or other arrangement: please specify the arrangements above by number, or specify here: \_\_\_\_\_ 5
- 

20. What main factors are considered in the selection of students for the gifted and talented program? (You may answer YES to any of the factors below.)

|   | Yes                      | No                       |
|---|--------------------------|--------------------------|
| Scores on standardized examinations given to all students | <input type="checkbox"/> | <input type="checkbox"/> |
| Additional test results                                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Teacher or counselor recommendations and reports          | <input type="checkbox"/> | <input type="checkbox"/> |
| Parent requests   | <input type="checkbox"/> | <input type="checkbox"/> |
| School grades   | <input type="checkbox"/> | <input type="checkbox"/> |
| Provides opportunities for racial and ethnic groups       | <input type="checkbox"/> | <input type="checkbox"/> |
| Personal interview  | <input type="checkbox"/> | <input type="checkbox"/> |
| Student requests  | <input type="checkbox"/> | <input type="checkbox"/> |
| Other (please specify)                                    | <input type="checkbox"/> | <input type="checkbox"/> |

21. Is there a gifted and talented program for the students in your **MIDDLE** schools?

- Yes  
Which grades \_\_\_\_\_)
- No

22. What subjects does the MIDDLE SCHOOL gifted and talented program cover?

- Math
- Science
- English/Literature
- Social studies
- Foreign Language
- Computer Science

- Music
- Art
- Other (please specify: \_\_\_\_\_)

23. Does gifted and talented instruction take place primarily within your school/school building, or primarily outside it (for example, at another school)?

- Inside the school building
- Outside the building or at another school

24. Which of the following statements best describes the way gifted and talented instruction is organized for the students in your middle schools?

- Students are taken from their regular classes for supplemental gifted and talented instruction  1
- GNT students are grouped together for all or most subjects and have their own curriculum  2
- GNT students are given enriched instruction only in the particular subjects in which they excel  3
- GNT students are given supplemental instruction within their own classroom  4
- Other arrangement: please specify: \_\_\_\_\_  5

25. What main factors are considered in the selection of students for the enrichment programs at the middle school?

|   | Yes                      | No                       |
|---|--------------------------|--------------------------|
| Scores on standardized examinations given to all students | <input type="checkbox"/> | <input type="checkbox"/> |
| Additional test results                                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Teacher or counselor recommendations and reports          | <input type="checkbox"/> | <input type="checkbox"/> |
| Parent requests   | <input type="checkbox"/> | <input type="checkbox"/> |
| School grades   | <input type="checkbox"/> | <input type="checkbox"/> |
| Provides opportunities for racial and ethnic groups       | <input type="checkbox"/> | <input type="checkbox"/> |
| Personal interview  | <input type="checkbox"/> | <input type="checkbox"/> |
| Student requests  | <input type="checkbox"/> | <input type="checkbox"/> |
| Other (please specify)                                    | <input type="checkbox"/> | <input type="checkbox"/> |

26. All schools have some students who learn differently or at a different pace than other students. Do your **ELEMENTARY** schools offer any of the following remedial activities for these students? Check yes or no on each line.

|  | ELEMENTARY PROGRAM AVAILABLE? |                          |
|--|-------------------------------|--------------------------|
|  | Yes                           | No                       |
| Pull-out program in reading or English | <input type="checkbox"/>      | <input type="checkbox"/> |

|  | ELEMENTARY PROGRAM AVAILABLE? |                          |
|--|-------------------------------|--------------------------|
|  | Yes                           | No                       |
| Pull-out program in math                                       | <input type="checkbox"/>      | <input type="checkbox"/> |
| Adult tutors work 1:1 with students in reading or English      | <input type="checkbox"/>      | <input type="checkbox"/> |
| Adult tutors work 1:1 with students in math                    | <input type="checkbox"/>      | <input type="checkbox"/> |
| Peer-tutoring in any subject                                   | <input type="checkbox"/>      | <input type="checkbox"/> |
| Extra subject period instead of elective or exploratory course | <input type="checkbox"/>      | <input type="checkbox"/> |
| After-school or before-school classes or coaching classes      | <input type="checkbox"/>      | <input type="checkbox"/> |
| Extra work or homework from classroom teacher                  | <input type="checkbox"/>      | <input type="checkbox"/> |
| Saturday classes   | <input type="checkbox"/>      | <input type="checkbox"/> |
| Summer school  | <input type="checkbox"/>      | <input type="checkbox"/> |
| Mentoring program  | <input type="checkbox"/>      | <input type="checkbox"/> |
| Other (describe):  | <input type="checkbox"/>      | <input type="checkbox"/> |

27. Please attach a list of any elective courses you offer at the MIDDLE and HIGH schools.

28. Does the high school offer a specific course to prepare for the SAT/ACT?

- Yes
- No

29. How many full-time school counselors are available? What is the student load per counselor?

Elementary: \_\_\_\_\_ # of counselors      Student load per counselor: \_\_\_\_\_  
Middle: \_\_\_\_\_ # of counselors      Student load per counselor: \_\_\_\_\_  
High: \_\_\_\_\_ # of counselors      Student load per counselor: \_\_\_\_\_

30. Do high school student receive the following career planning services?

|                          | Yes                      | No                       | School does not offer    |
|--------------------------|--------------------------|--------------------------|--------------------------|
| a. Help with filling out | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

|  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| college/vocational/technical school applications                         |                          |                          |                          |
| b. Help with filling out financial aid forms                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| c. Assistance in writing essays for college applications                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| d. Days off from school to visit college or vocational/technical schools | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| e. Career placement counseling   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| f. Practice interviews   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| g. Other:  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

31. Do your elementary schools offer a chorus/choir?

- Yes (If yes, please specify grade levels: \_\_\_\_\_)
- No

32. What grade level can students start studying an instrument? \_\_\_\_\_

33. Do your elementary schools offer a band for students?

- Yes (If yes, please specify grade levels: \_\_\_\_\_)
- No

34. Do your elementary schools offer an orchestra for students?

- Yes (If yes, please specify grade levels: \_\_\_\_\_)
- No

35. Are the following activities available to **MIDDLE SCHOOL** students in your school?

|   | <b>YES</b>               | <b>NO</b>                |
|---|--------------------------|--------------------------|
| 4-H, Boys & Girls Clubs, or Boy Scouts/Girls Scouts | <input type="checkbox"/> | <input type="checkbox"/> |
| Academic honor societies                            | <input type="checkbox"/> | <input type="checkbox"/> |
| Band  | <input type="checkbox"/> | <input type="checkbox"/> |

|   |                          |                          |
|---|--------------------------|--------------------------|
| Bicycling, rollerblading, or skateboarding  | <input type="checkbox"/> | <input type="checkbox"/> |
| Book club   | <input type="checkbox"/> | <input type="checkbox"/> |
| Business or entrepreneurship club   | <input type="checkbox"/> | <input type="checkbox"/> |
| Career club   | <input type="checkbox"/> | <input type="checkbox"/> |
| Chess club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Chorus or choir   | <input type="checkbox"/> | <input type="checkbox"/> |
| Community service club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Computer clubs  | <input type="checkbox"/> | <input type="checkbox"/> |
| Conservation, recycling, or environmental group such as the Sierra Club or Nature Conservancy                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Creative writing or literary magazine   | <input type="checkbox"/> | <input type="checkbox"/> |
| Debate or speech team   | <input type="checkbox"/> | <input type="checkbox"/> |
| Drama club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Educational clubs (Odyssey of the Mind, etc)  | <input type="checkbox"/> | <input type="checkbox"/> |
| Foreign language club   | <input type="checkbox"/> | <input type="checkbox"/> |
| Future Farmers of America club  | <input type="checkbox"/> | <input type="checkbox"/> |
| History club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Orchestra   | <input type="checkbox"/> | <input type="checkbox"/> |
| Other subject matter clubs (art)  | <input type="checkbox"/> | <input type="checkbox"/> |
| Photography Club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Political club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Science club (Please specify if there is a specific focus such as astronomy, robotics, Project Lead the Way, etc: | <input type="checkbox"/> | <input type="checkbox"/> |
| Science fair  | <input type="checkbox"/> | <input type="checkbox"/> |
| Student council   | <input type="checkbox"/> | <input type="checkbox"/> |
| Student newspaper   | <input type="checkbox"/> | <input type="checkbox"/> |
| Student yearbook  | <input type="checkbox"/> | <input type="checkbox"/> |
| Theatre (e.g. school plays or musicals)   | <input type="checkbox"/> | <input type="checkbox"/> |
| Religious organizations   | <input type="checkbox"/> | <input type="checkbox"/> |
| Interscholastic sports  | <input type="checkbox"/> | <input type="checkbox"/> |
| Intramural sports   | <input type="checkbox"/> | <input type="checkbox"/> |
| Vocational education clubs  | <input type="checkbox"/> | <input type="checkbox"/> |

36. Which extracurricular sports teams are available to **MIDDLE SCHOOL** students?  
Please check ✓ if sport is available.

|                       | <b>Boys</b> | <b>Girls</b> |
|-----------------------|-------------|--------------|
| Baseball/softball     |             |              |
| Basketball            |             |              |
| Cheerleading or dance |             |              |
| Field hockey          |             |              |
| Football              |             |              |

|               |  |  |
|---------------|--|--|
| Golf          |  |  |
| Gymnastics    |  |  |
| Ice hockey    |  |  |
| Soccer        |  |  |
| Swimming      |  |  |
| Tennis        |  |  |
| Track         |  |  |
| Volleyball    |  |  |
| Wrestling     |  |  |
| Cross country |  |  |
| Lacrosse      |  |  |
| Ski/Snowboard |  |  |
| Other:        |  |  |
| Other:        |  |  |
| Other:        |  |  |

37. Are the following activities available to **HIGH SCHOOL** students (grades 9-12)?

|   | <b>YES</b>               | <b>NO</b>                |
|---|--------------------------|--------------------------|
| 4-H, Boys & Girls Clubs, or Boy Scouts/Girls Scouts   | <input type="checkbox"/> | <input type="checkbox"/> |
| Academic honor societies  | <input type="checkbox"/> | <input type="checkbox"/> |
| Band  | <input type="checkbox"/> | <input type="checkbox"/> |
| Bicycling, rollerblading, or skateboarding  | <input type="checkbox"/> | <input type="checkbox"/> |
| Book club   | <input type="checkbox"/> | <input type="checkbox"/> |
| Business or entrepreneurship club   | <input type="checkbox"/> | <input type="checkbox"/> |
| Career club   | <input type="checkbox"/> | <input type="checkbox"/> |
| Chess club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Chorus or choir   | <input type="checkbox"/> | <input type="checkbox"/> |
| Community service club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Computer clubs  | <input type="checkbox"/> | <input type="checkbox"/> |
| Conservation, recycling, or environmental group such as the Sierra Club or Nature Conservancy                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Creative writing or literary magazine   | <input type="checkbox"/> | <input type="checkbox"/> |
| Debate or speech team   | <input type="checkbox"/> | <input type="checkbox"/> |
| Drama club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Educational clubs (Odyssey of the Mind, etc)  | <input type="checkbox"/> | <input type="checkbox"/> |
| Foreign language club   | <input type="checkbox"/> | <input type="checkbox"/> |
| Future Farmers of America club  | <input type="checkbox"/> | <input type="checkbox"/> |
| History club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Orchestra   | <input type="checkbox"/> | <input type="checkbox"/> |
| Other subject matter clubs (art)  | <input type="checkbox"/> | <input type="checkbox"/> |
| Photography Club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Political club  | <input type="checkbox"/> | <input type="checkbox"/> |
| Science club (Please specify if there is a specific focus such as astronomy, robotics, Project Lead the Way, etc: | <input type="checkbox"/> | <input type="checkbox"/> |



|   |                          |                          |
|---|--------------------------|--------------------------|
|   |                          |                          |
| Science fair                            | <input type="checkbox"/> | <input type="checkbox"/> |
| Student council                         | <input type="checkbox"/> | <input type="checkbox"/> |
| Student newspaper                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Student yearbook                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Theatre (e.g. school plays or musicals) | <input type="checkbox"/> | <input type="checkbox"/> |
| Religious organizations                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Interscholastic sports                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Intramural sports                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Vocational education clubs              | <input type="checkbox"/> | <input type="checkbox"/> |

38. Which extracurricular sports teams are available to **HIGH SCHOOL** students?  
Please check  if sport is available.

|                       | <b>Boys</b> | <b>Girls</b> |
|-----------------------|-------------|--------------|
| Baseball/softball     |             |              |
| Basketball            |             |              |
| Cheerleading or dance |             |              |
| Field hockey          |             |              |
| Football              |             |              |
| Golf                  |             |              |
| Gymnastics            |             |              |
| Ice hockey            |             |              |
| Soccer                |             |              |
| Swimming              |             |              |
| Tennis                |             |              |
| Track                 |             |              |
| Volleyball            |             |              |
| Wrestling             |             |              |
| Cross country         |             |              |
| Lacrosse              |             |              |
| Ski/Snowboard         |             |              |
| Other:                |             |              |
| Other:                |             |              |
| Other:                |             |              |

39. Do you partner with any outside organizations (businesses, not-for-profit organizations, churches, to provide special programs or services to your students? If so, explain:

40. Currently, does someone at your school oversee or coordinate school health and safety programs and activities?

- Yes  
 No

41. Is there a full-time registered nurse who provides health services to students at your school? (A full-time nurse means that a nurse is at the school during all school hours, 5 days per week.)

- Yes
- No

42. Does your district offer student services or programs related to the following topics? (Mark yes or no next to each topic.)

|   | <b>YES</b>               | <b>NO</b>                |
|---|--------------------------|--------------------------|
| HIV, STD, or teen pregnancy prevention  | <input type="checkbox"/> | <input type="checkbox"/> |
| Tobacco-use prevention  | <input type="checkbox"/> | <input type="checkbox"/> |
| Physical activity   | <input type="checkbox"/> | <input type="checkbox"/> |
| Nutrition and healthy eating  | <input type="checkbox"/> | <input type="checkbox"/> |
| Character education (Programs for social, emotional, and ethical development) | <input type="checkbox"/> | <input type="checkbox"/> |
| Bullying and/or violence prevention   | <input type="checkbox"/> | <input type="checkbox"/> |
| Tobacco use prevention  | <input type="checkbox"/> | <input type="checkbox"/> |
| Alcohol use prevention  | <input type="checkbox"/> | <input type="checkbox"/> |
| Drug prevention   |                          |                          |

43. Does the **HIGH SCHOOL** have a student-led club that aims to create a safe, welcoming, and accepting school environment for all youth, regardless of sexual orientation or gender identity? These clubs sometimes are called gay/straight alliances.

- Yes
- No

## **Appendix B**

### **In response to the request of Wheatland-Chili Central School District Superintendent Thomas Gallagher**

#### **Introduction**

On January 3, 2008, University of Rochester Warner School Professors Brian Brent and Stephen Uebbing met with Thomas Gallagher, Superintendent of Schools of the Wheatland-Chili Central School District. The purpose of the meeting was to discuss the impact of enrollment declines on the viability of the district to provide a competitive program to the Wheatland-Chili community. Mr. Gallagher had completed extensive analysis of several of the key variables associated with these issues and had already started an inquiry process within the district. Professors Brent and Uebbing both complement Mr. Gallagher on the breadth and depth of his analysis.

Mr. Gallagher, however, felt that his inquiry had reached a natural boundary largely formed as a function of his position as superintendent. The issues yet to be explored, he intimated, would be best visited by a disinterested third party, capable of objective, face value analysis, without the restraint of community loyalties or expectations. Mr. Gallagher requested that Brent and Uebbing consider a formal study to respond to the issues which he perceived the district to be facing.

Brent and Uebbing requested that Mr. Gallagher frame what he perceived as the essential questions facing the district. This document is a proposal by Brent and Uebbing with the assistance of other colleagues to conduct an inquiry in response to the questions posed by the Superintendent. The project proposal format is presented as specific responses to each of Mr. Gallagher's questions which are presented in italics.

## **Question One**

*Can the Wheatland Chili Central School District, with a student population of approximately 700 provide a comprehensive K-12 program in Monroe County over the next decade that is fiscally sustainable?*

There are two distinct issues inherent in this question. The first is program quality; the second is financial impact. Our approach will deal with each question separately and then merge the findings into a cohesive response.

The notion of a “comprehensive program” in question one and “competitive program” that follows in question two, suggest that there are certain benchmarks the community would desire in its school’s regarding the breadth and depth of program. We propose to do an analysis of the school program offered in the Wheatland Chili Central School District (WCCSD) and compare it with program profiles found in other Monroe County districts contiguous to WCSDS. The end product will be both qualitative and quantitative in nature.

Research Method: Dr. Sherri Lauver, Program Evaluator (PE) will conduct a comprehensive program analysis of the WCCSD. That analysis will be both qualitative and quantitative in nature. However, the primary focus of the analysis will be on access, not efficacy.

The PE will then prepare and administer a comprehensive program survey for each of the Monroe County districts contiguous to WCCSD. The PE will administer the survey and follow up with qualitative questions to insure an accurate profile of contiguous Monroe County schools.

***Product:*** Our team will present a profile of WCCSD as it compares to contiguous Monroe County school districts.

***Timeline:*** Work on this aspect of the project will begin as soon as the team receives a fully executed letter of understanding from the Superintendent. The bulk of this work will be

**completed during July and August, 2008. It is the intention of the team to present the work product to the Superintendent and Board of Education by mid October, 2008.**

The PE will also do a search of high performing schools in New York State that have student populations between 600-800 students. The PE will identify any school district within the sample that is designated as a New York State High Performing District or has one or more buildings that are designated as New York State High Performing Schools. Using both Warner and WCCSD resources, we will contact those schools and administer the program survey used in researching contiguous districts. The study will include information on district socio-economic status as defined by the NYSED and give special attention to schools that are grouped in the same socio-economic needs category as WCCSD.

Limitations: the research team will not survey districts out of state. New York has very specific school requirements that often exceed those found in other states. It would not be reasonable to compare program that is largely required against program that is not required. Nor will the researchers compare with non-public schools within New York State, as these schools are largely not subject to the full breadth of requirements found in public schools.

***Product:* Our team will present a profile of WCCSD as it compares to similar sized school that are designated as High Performing by NYSED. Our team will provide special focus on districts that have a similar socio-economic basis similar to that found in the WCCSD.**

***Timeline:* Work on this aspect of the project will begin as soon as the team receives a fully executed letter of understanding from the Superintendent. The bulk of this work will be completed during July and August, 2008. It is the intention of the team to present the work product to the Superintendent and Board of Education by mid October, 2008.**

## **Question Two**

*If a comprehensive program can not be maintained in its current state, what options could be considered to reach that goal?*

The study team will interview representatives from the New York State Education Department regarding options and aid enhancement currently available to school districts that wish to reorganize. Historically Reorganization Incentive Aid has been made available to districts wishing to consolidate. However, in recent years that aid has not been consistently available to districts. In the latest state budget, the aid was made available largely to accommodate an Albany County district that wished to consolidate.

Additionally the study team will consider the option of allowing certain students to attend other districts on a tuition basis. The team will ascertain the availability of tuition options within fifteen miles of the district boundaries.

***Product:* Our team will present a series of options including district reorganization, tuition to other districts and other options discovered through our research.**

***Timeline:* Work on this aspect of the project will begin as soon as the team receives a fully executed letter of understanding from the Superintendent. The team expects to be able to present this analysis to the Superintendent and the Board of Education by mid October, 2008.**

## **Question Three**

*How would each of those possible options impact the district programmatically, fiscally, and community identity?*

For each option identified in question three, the study team will provide a preliminary financial analysis including costs, available state aid and local tax impact. In addition the team will ascertain other key financial data including total and local cost per student. The team will also

conduct an analysis of school districts in the Greater Rochester Area to ascertain what experience districts have had with budget defeats, or near defeats, as related to tax rates. The team will ascertain if there is a relationship between True Value Tax Rates and budget success.

The team will not ascertain interest on the part of possible partners in a reorganization effort as that is a governance function beyond the scope of our work.

Programmatic analysis will be a logical extension of the data collected in question one. For each option identified, in question three, using the data available in question one, the team will provide preliminary projections regarding the program that would be available to WCCSD students.

Community identity is addressed as part of our proposed work in question four.

Limitations: Both financial and program analysis have inherent limitations. Financial analysis must be based upon trend data and existing state regulations. Either could change in the future.

The assumption that consolidation with another district would provide access to all existing programs in both districts is, at best, preliminary. In reality, the synergy of the two organizations would allow new opportunities not apparent at this time. By the same token, there may be existing programs that do not continue in a consolidated district.

***Product:* Our team will present an analysis of the financial and program implications of the options presented in question three.**

***Timeline:* Work on this aspect of the project will begin as soon as the team receives a fully executed letter of understanding from the Superintendent. The team expects to be able to present this analysis to the Superintendent and the Board of Education by mid October, 2008.**

## **Question Four**

*What data resources are necessary to be compiled to respond to these questions?*

The WCCSD has provided the research team with preliminary data regarding expenditures, staffing and enrollment. Indeed, the district has completed many correlations which will be beneficial to the study team. The team will arrange to have additional data created as follows:

Updated enrollment forecasting. The team proposes that the WCCSD update the enrollment projections completed by the Genesee/Finger Lakes Regional Planning Council in 2004. This study used multiple methods to enhance the cohort survival technique. Such methods included data on housing starts and live births. In an updated study, we would include the potential impact of the recent announcements regarding Catholic School closings.

1. Impact data. The WCCSD area currently lacks the infrastructure that would serve to attract additional development. In addition, there appear to be certain zoning restrictions which may further impede development. Yet the district is within ten miles of the single largest employer in the city of Rochester (i.e. the University of Rochester) and actually includes parts of one of the region's other largest employers (Rochester Institute of Technology). Would infrastructure improvement and zoning changes impact development? The study team will interview several residential developers and make projections.
2. Community desires. What is the vision and desire of the community regarding the school district? After preliminary data are collected, and certain statements can be made regarding the impact of development, what is it the community truly desires from its school district? The study team will hold a series of focus groups within the community involving key stakeholders and present the main findings of the study. At that time the additional questions regarding the vision and desire of the community will be added to the study.



***Product:*** Our team will present an analysis of findings regarding infrastructure improvements and community perceptions.

***Timeline:*** Work on this aspect of the project will begin after the Superintendent and Board of Education have had the opportunity to react to the reports presented in October. Focus group work would take place in November 2008. Interviews with residential developers and other sources would be ongoing, beginning in the summer. The team expects to be able to present this analysis to the Superintendent and the Board of Education by mid January, 2009.

**Final Product:**

The final work product will be a comprehensive analysis of the four questions posed by the Superintendent. The team will provide eighteen copies of the final report along with a power point presentation of the findings. Team members will be available for up to three presentations of the findings.

**Timeline and Fees:**

Timeline: The team would begin its work immediately upon receiving a fully executed letter of understanding from the Superintendent. The bulk of the initial analysis will be accomplished during the summer months. Focus group work would commence upon the completion of basic data analysis, as one purpose of the focus group activity would be to react to the data analysis. The goal of the team would be to make a final presentation to the WCCSD Board of Education in January 2009.

Cost: The full cost of the proposed study is \$34,000 plus certain specific expenses including any required travel costs outside of Monroe County, printing costs beyond the 18 copies of the report included in the proposal and work requested of team members above and beyond the parameters of this proposal. If the district elects to update the enrollment study previously completed with the Genesee Regional Planning Council, that cost would be negotiated separately with that agency.

Payment: The district will make a payment of 10% of the total program cost upon authorization of the study, an additional 40% on or about October 1, 2008 and the final 50% upon completion of the study, which is intended to be on or about February 1, 2009.

**Proposed Team:**

All team members are faculty at the University of Rochester, Warner School of Education. Other individuals will assist the team as needed.

*Dr. Brian Brent*, Professor of Educational Leadership, team member emphasis on finance

*Dr. Sherri Lauver*, Assistant Professor, team member emphasis on program evaluation

*Dr. Stephen Uebbing*, Associate Professor of Educational Leadership, team member emphasis on organizational and community issues

Attached please find the qualifications and credentials of team members.

Respectfully Submitted:

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Stephen J. Uebbing, Ed.D., Team Leader

## Appendix C

On December 23 the New York State Commission on Property Tax Relief released their findings regarding school consolidation. We provide as an appendix the “fact sheet” provided by the commission. We are not able to conduct an analysis regarding the methodology of their work, and so provide it as recent research without comment as to its validity. The fact sheet follows in its entirety.

December 23, 2008

### **School District Consolidation Could Reduce Property Taxes Without Adverse Impacts**

A Fact Sheet Prepared by the Staff of the New York State Commission on Property Tax Relief  
New York State has the highest local taxes in America – 78 percent above the national average. School property taxes, the majority of the property tax burden, are 62 percent of total property taxes outside of New York City. School property taxes are high because New York spends more per pupil on education than any state in the country (an estimated \$18,768 in 2008-09). A large portion of spending is due to administrative expenses, which are higher on a per pupil basis for smaller districts. New York State has (outside of New York City), a lower average district size (about 2,500 pupils per district) than the U.S. average (3,400) and a much lower one compared to states that have countywide school districts – e.g., Florida (40,000), Maryland (36,000), North Carolina (12,000) and Virginia (9,000).

One of the recommendations put forth by the Commission to reduce the school property tax burden is consolidation of school districts with fewer than 1,000 pupils. In addition, the Commissioner of Education should be given authority to order the consolidation of school districts under 2,000 students.

The Commission recognizes that communities may have concerns regarding a loss of identity if school buildings are closed or sports teams disbanded. As such, it recommended consolidating school *districts*, not closing schools. Efficiencies can be achieved through centralized administration of newly created, larger school districts. In fact, in certain areas of the state, only administrative consolidation may be practical, especially where geographic distances would be too great to permit a reduction in the number of school buildings.

Consolidating small school districts to achieve economies of scale and increase educational opportunities is not new to New York State. The State has provided additional aid to encourage school district reorganization since the late 1920s when there were approximately 10,000 districts. The pace of school district reorganizations has slowed considerably since the 1990s leaving a large number with low student enrollments – approximately 200, or 28 percent, of New York State’s school districts have fewer than 1,000 students.

There are potential fiscal and educational benefits from consolidating the state’s smallest school districts:

- The Commission found that New York State school districts with less than 1,000 students would reduce total per-pupil expenditures by up to seven dollars for each additional student. Thus, for every 100 pupils added to a district with fewer than 1,000 students, the total expense per student would be reduced by up to \$700.

The Maxwell School at Syracuse University found that consolidation would save two 900-pupil school districts in New York State 7 to 9 percent and two 300 pupil districts approximately 20 percent. The Commission on Local Government Efficiency and Competitiveness used these findings to estimate savings of \$159 to \$189 million from merging New York State districts with fewer than 900 students.

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The Commission found that larger districts have a higher likelihood of providing increased educational opportunities. For example, using data for New York State districts with fewer than 954 pupils, it found that larger district size is associated with a higher likelihood for Advanced Placement participation.

The Commission recognizes that the impact of consolidation will vary across the state. Its school district consolidation recommendation provides that determinations of where and how consolidations occur be guided by a careful review of the costs and benefits of each potential merger. Such analyses should include consideration of demographic, geographic, educational and fiscal indicators by the State Education Department and/or a committee of interested parties within each BOCES region.

If the school district consolidation recommendations were implemented for all districts under 1,000 pupils and half the districts of 1,000 to 2,000 pupils, with savings on the order of those found in the Maxwell School study referenced above, the total statewide savings could reach \$450 million.

