

**THE PROPOSED REORGANIZATION OF THE
ST. JOHNSVILLE-OPPENHEIM-EPHRATAH CENTRAL SCHOOL DISTRICT**

**A STUDY AND RECOMMENDATION ON THE
LOCATION OF THE SUPERVISORY DISTRICT/BOCES
OF THE REORGANIZED SCHOOL DISTRICT**

**THE UNIVERSITY OF THE STATE OF NEW YORK
THE STATE EDUCATION DEPARTMENT
Office of Educational Management Services
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EXECUTIVE SUMMARY

The residents of the Oppenheim-Ephratah Central School District, located in the Herkimer-Fulton-Hamilton-Otsego (Herkimer) Supervisory District/BOCES, and the residents in the St. Johnsville Central School District, located in the Hamilton-Fulton-Montgomery (H-F-M) Supervisory District/BOCES, are undertaking a reorganization feasibility study. It is the Commissioner's responsibility to determine in which Supervisory District/BOCES the reorganized district would be located if approved by the residents. To assist the Commissioner in his decision-making, staff in the Education Department gathered and analyzed data and prepared a study.

The Commissioner has issued his decision that the proposed Oppenheim-Ephratah-St. Johnsville Central School District, if approved by the district residents, will be located in the H-F-M BOCES. The best educational interests of the students and the adults of the reorganized district will be served more effectively and efficiently in this BOCES as a regional service provider of instructional and support programs.

The study finds that the two Supervisory Districts have relatively small enrollment BOCES that offer a comparable array of services. Staff recommended that the Commissioner select H-F-M BOCES as the Supervisory District for the reorganized district because of the greater access of students to educational opportunities such as the Engineering Technology sequence with the College, the alternative education services for at-risk students and the distance learning program sharing 15 classes.

This was confirmed by letters of support from H-F-M BOCES components, Board President and others including the FM College President. Letters of support from the Herkimer BOCES components and others offered financial considerations as the rationale for choosing Herkimer BOCES. The Commissioner's decision should be based on educational advantages before financial reasons.

INTRODUCTION

Oppenheim-Ephratah Central School District and the St. Johnsville Central School District are undertaking a reorganization feasibility study to consider joining by centralization in accordance with Education Law Sections 1801 through 1804. By State Education Department policy if boards of education agree that school reorganization has potential benefit for their districts, a comprehensive feasibility study should be jointly undertaken. The purpose of the study is to develop information which describes how a new district would likely operate if reorganization were to be implemented. The study serves two primary audiences: 1) it will provide key information to inform citizens about the proposal and assist them in reaching their decision about the reorganization and 2) it will provide important information for the Commissioner of Education to determine if the proposal has sufficient advantages to warrant issuing the statutory orders to implement the reorganization.

In the spring of 2009 the St. Johnsville board of education decided to examine the merits of reorganization with a neighboring district. Both the Fort Plain district to the east and the Oppenheim-Ephratah district to the west were considered potential partners and both were interested. The boards of education of the three districts decided that the fairest way to proceed would be to enter into a study to determine the better partner for St. Johnsville, from a program and financial perspective. A consultant reviewed a number of key variables: enrollment; programming; staffing; finances; contracts; facilities; and other factors. The study concluded that a centralization feasibility study between St. Johnsville and Oppenheim-Ephratah had the greatest potential for a positive outcome as a reorganized school district.

The two districts then made an application to the New York State Department of State for a Local Government Efficiency Grant Program 2009-10, High Priority Planning for \$35,000. They were approved, issued an RFP to select a consultant for the study and Alan Pole and Philip Martin of Castello and Silky Educational Consultants were selected. The study began on October 1, 2010. By May 1, 2011 the advisory committee and consultant work was complete. A draft of the study is to be provided to the Education Department staff responsible for district organization to review and approve on June 1. Public information activities will follow. The boards of education of the respective districts will make a decision on or about October 11 whether to proceed to an advisory referendum in which residents of each district vote yes or no on their support of the proposed reorganization.

If the vote is “yes” in each district, the Commissioner will issue the Order for a statutory vote on centralization to take place on or about December 7. If the vote is “yes” in each district as announced at the end of the tabulation, the Oppenheim-Ephratah-St. Johnsville Central School District will be established. The Commissioner will then issue an Order for a vote to elect a new board of education to take place on or about January 31, 2012. Following this in a few days the District Superintendent of the Supervisory District will hold the first organizational meeting of the new district, take the oath of office of the board members and oversee the election of the officers. The new board will then proceed with all matters necessary to prepare for the operation of the district on July 1, 2012.

The St. Johnsville district is a component (member) of the Hamilton-Fulton-Montgomery Supervisory District and Board of Cooperative Educational Services (BOCES) as is the Fort Plain district. The Oppenheim-Ephratah district, however, is a component of the Herkimer-Fulton-Hamilton-Otsego Supervisory District and BOCES. When the preliminary data analysis study determined that St. Johnsville's better fit was with Oppenheim-Ephratah as a reorganization partner, an additional element of data has been added that must be addressed. That is: in which Supervisory District/BOCES will the new district be located if the residents of St. Johnsville and Oppenheim-Ephratah approve the establishment of a new, combined district? This is important information to district residents. We know that residents, especially those in rural areas like these, are interested in, and often express allegiance to their BOCES, in a similar fashion as they do to their school district. Therefore, a commitment has been made by Education Department staff to have this information available to be included in the feasibility study draft due June 1.

The responsibility for making decisions about school districts and their location in a Supervisory District/BOCES resides with the Commissioner of Education. The statutory basis is found in Education Law Section 2201. The criterion for a decision is that the action will promote the educational interests of the area. While the statute is directed toward transferring school districts, determining the location in a Supervisory District/BOCES when a new district has been created in which the two predecessor districts are located in different Supervisory Districts/BOCES, is analogous and would require a similar methodology which has been followed by the State Education Department in responding to school district transfer.

Staff responsible for school district and BOCES reorganization have completed analyses when school districts were considered for transfer and have prepared surveys required by statute when District Superintendents have vacated the offices to assist the Commissioner in his deliberations. The following will provide programmatic and financial information about the Hamilton-Fulton-Montgomery Supervisory Districts/BOCES, herein referred to as H-F-M BOCES and the Herkimer-Fulton-Hamilton-Otsego Supervisory District/BOCES, herein referred to as Herkimer BOCES.

The Education Department has developed certain criteria as a guide in reaching a determination relative to redistricting of Supervisory Districts generally. The organizational structure of a Supervisory District should ensure that:

- The number of component districts and geographic size is such that the District Superintendent can execute his/her statutory and administrative responsibilities as a State officer in accordance with Section 2215 of the Education Law in a competent and cost effective manner.
- The District Superintendent can effectively carry out responsibilities as the chief executive officer of the Board of Cooperative Educational Services in accordance with Section 1950 of the Education Law.
- The pupil enrollment base is sufficient to support a variety of quality instructional and support services at appropriately located educational centers to extend and enhance the programs of component school districts.

- The financial base is sufficient to support BOCES, administrative, instructional and related support services costs at an affordable level for component school districts.

In addition, when consideration is being given to the location of a component school district in one Supervisory District or another as a result of centralization, more specific criteria elements would be studied to determine how to best serve the educational interests of students as well as the delivery of BOCES services on a regional basis.

These criteria elements include:

Criteria Elements Relative to the Reorganized District:

- Number and variety of courses available in career education.
- Travel distance and time for students to the career centers.
- Number and variety of special education classes available to students.
- Number and variety of instructional and support services available to the school district.
- Financial impact; program and administrative.
- Debt service obligations.

Criteria Elements Relative to each BOCES from Which District Might Be Transferred

- Impact of component and student base remaining in the BOCES to assure continued support for programs and services at or near the current level at each BOCES center.
- Financial impact on remaining component districts, program and administrative costs.

**SUPERVISORY DISTRICT PROFILE SUMMARY DATA
H-F-M AND HERKIMER BOCES 2008-2009**

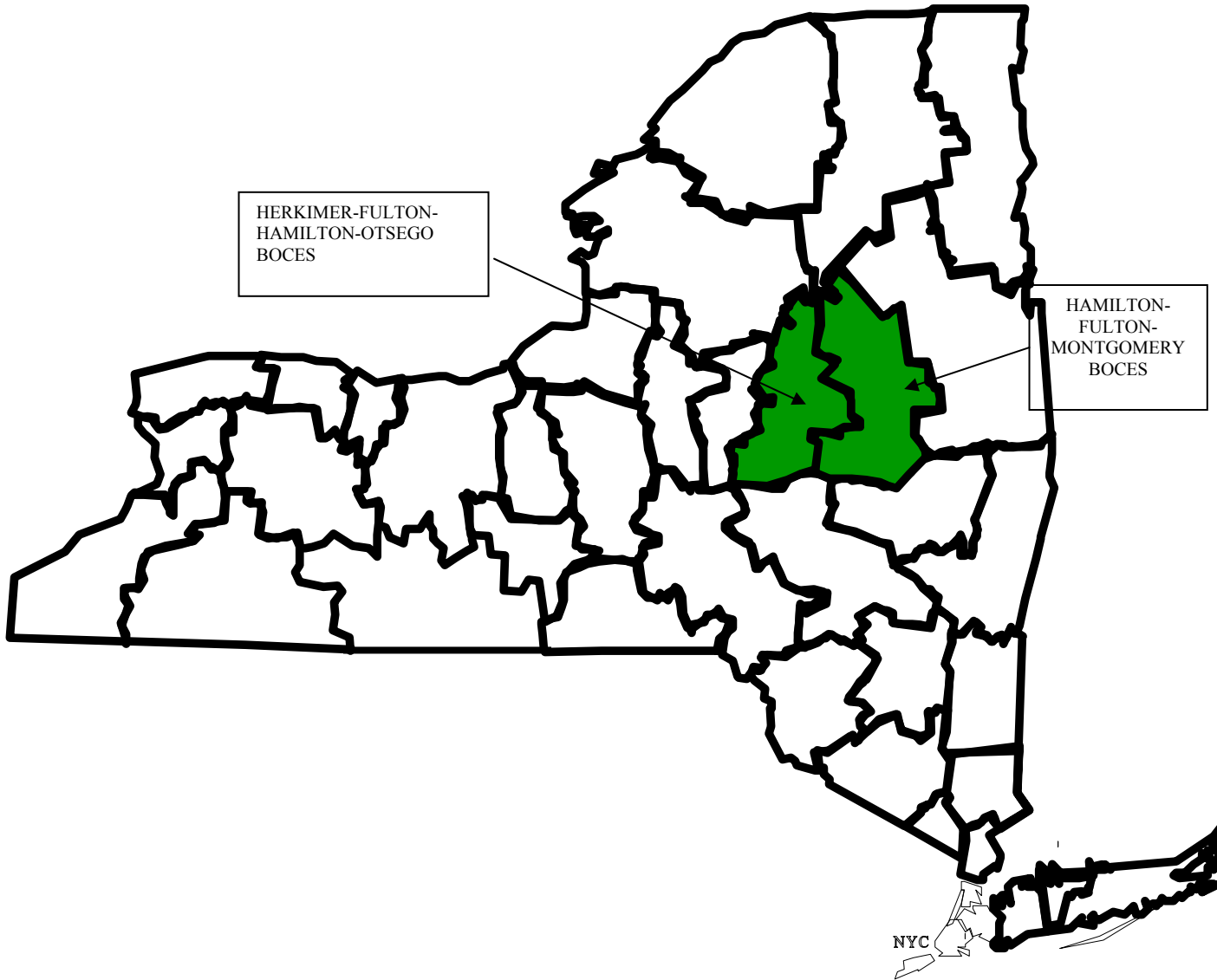
Supervisory District	H-F-M	Herkimer	State Average
Number of Component Districts	15	12	18
Enrollment of Components	16,360	10,947	42,199
Rank Among 37 BOCES	27	34	N/A
Area of Supervisory District	1,640	1,250	1,227
Rank Among 37 BOCES	13	16	N/A
Density of Supervisory District (Pupils/Sq.Mile)	10	9	34
Rank Among 37 BOCES	28	30	N/A
Number of Vocational Centers	1	1	2
Number of CTE Courses	17	16	20
Number of Secondary Pupils Enrolled in CTE	541	552	998
CTE Tuition	\$7,604	\$6,781	\$8,080
Special Education Staff Ratios 1:12:1*	\$21,159	\$22,625	\$25,787
Special Education Staff Ratios 1:6:1*	\$45,081	N/A	\$35,809
Special Education Staff Ratios - 1:8:1*	\$26,390	\$23,024	\$31,117
Special Education Staff Ratios 1:12:3*	\$29,087	\$22,708	\$34,153
Administration Per RWADA	\$ 77**	\$ 220	\$ 78
Capital Per RWADA	\$ 113	\$ 35***	\$ 44
Total Admin & Capital	\$ 190	\$ 255	\$ 122

*Special Education Tuitions do not include charges for related services.

** Accrued retiree health benefits have not been included in the Administration Per RWADA. They are included in the Administration Per RWADA in the Herkimer BOCES. When an approximate amount of this expenditure is included in the administration expense for the H-F-M BOCES to establish comparable budget methodologies, the Administration Per RWADA cost at H-F-M BOCES is \$127.

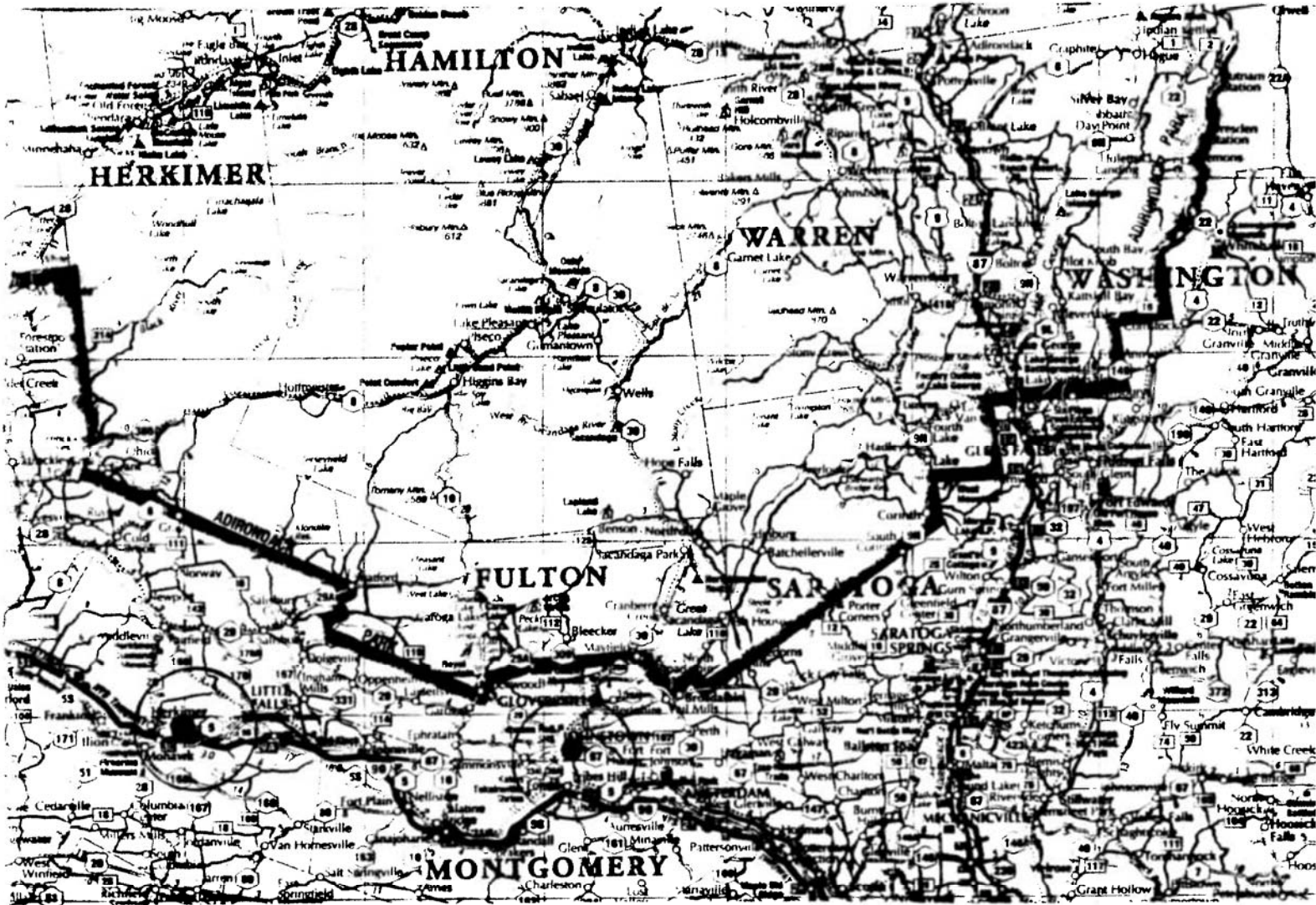
*** The building project in Herkimer BOCES of \$14,200,000 which was approved in 2008 did not begin payments until the 2010-11 school year. However, the fiscal impact is an important consideration. It adds \$147 Per RWADA to the Capital expense, to establish a total of \$156..

**HAMILTON-FULTON-MONTGOMERY AND
HERKIMER-FULTON-HAMILTON-OTSEGO
SUPERVISORY DISTRICTS AND BOCES**



Supervisory District	No. of Comp.	Enrollment	Square Miles
HAMILTON-FULTON-MONTGOMERY	15	16,360	1,640
HERKIMER-FULTON-HAMILTON-OTSEGO	12	10,947	1,250

HIGHWAY TRAVEL MAP
H-F-M BOCES and Herkimer BOCES
CTE Centers
Johnstown and East Herkimer



HAMILTON-FULTON-MONTGOMERY COMPONENTS

Component District Data

2008-2009

District Name	Enrollment	Area Square Miles	Density Pupil/Square Miles
Amsterdam	3656	77	47
Broadalbin-Perth	1956	88	22
Canajoharie	1059	98	11
Edinburg	67	74	1
Fonda Fultonville	1449	86	17
Fort Plain	855	57	15
Gloversville	3115	89	35
Johnstown	1895	55	34
Lake Pleasant	84	196	.51
Mayfield	995	50	20
Northville	451	143	3
Piseco	20	271	.51
St. Johnsville	452	34	13
Wells	169	269	1
Wheelerville	137	54	3
15 DISTRICTS	16360	1640	10

HERKIMER COMPONENTS

Component District Data
2008-2009

District Name	Enrollment	Area Square Miles	Density Pupil/Square Miles
Bridgewater-West Winfield	1293	96	13
Dolgeville	913	176	5
Frankfort-Schuyler	1200	40	30
Herkimer	1216	22	54
Ilion	1601	11	144
Little Falls	1157	57	20
Mohawk	914	44	21
Oppenheim-Ephratah	393	84	5
Poland	665	459	1
Richfield Springs	565	88	6
Van Hornsville (ODY)	230	66	3
West Canada Valley	800	107	7
12 DISTRICTS	10947	1250	9

STUDENT TRAVEL DISTANCE/TIME

St. Johnsville CSD and Oppenheim CSD

To H-F-M and Herkimer Centers

Place	One-Way	
	Miles	Time
St. Johnsville CSD to H-F-M BOCES	22	31
St. Johnsville CSD to Herkimer BOCES	17	22
Oppenheim-Ephratah CSD to Herkimer BOCES	18	27
Oppenheim-Ephratah CSD to H-F-M BOCES	17	23

**ADMINISTRATIVE BUDGET BY CATEGORY
HAMILTON-FULTON-MONTGOMERY BOCES
2008 - 2009**

ADMINISTRATIVE EXPENSES	EXPENSES
Certified Salaries	\$149,890
Non-Certified Salaries	438,349
Equipment	20,804
Materials and Supplies	25,575
Publications	327
Telephone	18,444
General Insurances	2,500
Professional Services - Legal	8,641
Auditors	24,198
District Superintendent Meetings and Travel Expense	3,677
Conference and Travel Expense	4,935
Service Contracts	3,356
Association Dues	12,792
Workers Comp Board	2,280
Advertising	2,616
Postage	9,378
Inventory Software	1,200
Financial Management Software Support	20,926
Facilities Bond Interest and Administration Fee	72,408
Miscellaneous	6,705
Payments to Other BOCES	94,126
Employee Benefits	263,152
Operations and Maintenance (Transfer)	52,122
Courier Service (Transfer)	11,787
Computer Support (Transfer)	15,883
TOTAL	\$1,266,075
LESS:	
Interest Earnings	(13,319)
Refund of Prior Years Expenses	(2,046)
Miscellaneous Revenues	(2,500)
NET COST TO DISTRICTS	\$1,248,208

Source: BOCES SA-111

**CAPITAL BUDGET BY CATEGORY
HAMILTON-FULTON-MONTGOMERY BOCES
2008 - 2009**

CAPITAL EXPENSES	EXPENSES
Rental of Facilities	\$1,957,251
Capital Fund	0
Net Cost to Districts	\$1,957,251

Source: BOCES SA-111

**CTE COURSES, SECTIONS AND ENROLLMENTS
HAMILTON-FULTON-MONTGOMERY BOCES
2008 - 2009**

Career and Technical Courses	Sections	Enrollment
<u>AGRICULTURE</u>		
Equine Science	2	18
Environmental Conservation	2	68
<u>BUSINESS AND OFFICE</u>		
Computer Information Technology & Networking	2	25
<u>AUTOMOTIVE</u>		
Auto Body Repair	2	20
Auto Technology	2	25
Vehicle Repair & Maintenance	2	19
<u>COMMERCIAL ART AND PRINTING</u>		
Digital Multimedia	4	52
<u>CONSTRUCTION AND MAINTENANCE</u>		
Construction Technology	3	34
<u>ELECTRICAL/ELECTRONICS</u>		
Electrical Occupations	1	11
<u>SERVICES</u>		
Cosmetology	4	52
<u>FOOD OCCUPATIONS</u>		
Culinary Arts/Foundations of Food Service	4	80
<u>SPECIAL AND MISCELLANEOUS</u>		
Criminal Justice	2	67
Careers in Education	2	24
<u>HEALTH OCCUPATIONS</u>		
New Visions Health Careers	1	4
Medical Assisting	2	37
Nurse Assisting	1	11
Practical Nursing	2	37

TOTAL PROGRAMS OFFERED	17
TOTAL ENROLLMENT (SECONDARY)	541
TOTAL ENROLLMENT INCLUDING ADULTS	584
TOTAL SECTIONS	38
AVERAGE CLASS SIZE	15
TUITION	\$7,604

Source: BOCES Data Files

**SPECIAL EDUCATION PROGRAMS, ENROLLMENTS AND TUITION
HAMILTON-FULTON-MONTGOMERY BOCES
2008 - 2009**

OPTION	ENROLLMENT	DISTRICT/CENTER BASED CLASSROOMS	TUITION*
4220 (1:12:1)	49	3/1	\$21,159
4230 (1:6:1)	61	11/0	\$45,081
4235 (1:8:1)	83	12/0	\$26,390
4240 (1:12:3)	70	7/0	\$29,087
TOTAL	263	33/1	N/A

* Related services are charged separately.

Source: BOCES Data Files

**BOCES SERVICES - IN ADDITION TO
CTE AND SPECIAL EDUCATION
HAMILTON-FULTON-MONTGOMERY BOCES
2008 - 2009**

SUBJECT/SERVICE	EXPENSES	HOW PROVIDED
ITINERANT PROGRAMS:		
Speech Improvement	\$174,285	BOCES
Art	51,912	BOCES
Physical Education	120,774	BOCES
Speech Impaired (Special Ed)	123,526	BOCES
Computer Coordination	81,334	BOCES
Music	117,508	BOCES
Guidance	89,835	BOCES
Dental Hygienist	1,911	BOCES
School Psychologist	169,489	BOCES
School Psychologist (Special Ed)	114,850	BOCES
Vision Instruction (Special Ed)	126,059	BOCES
Physical Therapy (Special Ed)	706,424	BOCES
Occupational Therapy (Special Ed)	900,295	BOCES
Workstudy Coordination	97,921	BOCES
Spanish	45,587	BOCES
Occupational Therapy Eval – Capital Region	224	Cross-Contract
Assistive Technology – Capital Region	13,256	Cross-Contract
Transition Services – Capital Region	882	Cross-Contract
Family & Consumer Science	64,915	BOCES
Speech Impaired – Herkimer	12,306	Cross-Contract
Physical Therapy – Herkimer	5,769	Cross-Contract
Occupational Therapy – Herkimer	6,171	Cross-Contract
School Social Worker – Herkimer	1,907	Cross-Contract
1:1 Aide – Herkimer	46,506	Cross-Contract
Total Itinerant Programs	\$3,073,655	
Total BOCES Programs	\$2,986,633	97%
Total Cross Contracted Programs	\$87,021	3%

SUBJECT/SERVICE	EXPENSES	HOW PROVIDED
GENERAL EDUCATION PROGRAMS:		
Alternative Education	\$1,002,172	BOCES
Distance Learning	651,885	BOCES
Arts in Education – Herkimer	4	Cross-Contract
Arts in Education – Capital Region	222	Cross-Contract
Exploratory Enrichment	30,615	BOCES
Arts in Education	72,571	BOCES
Portable Planetarium – Oneida-Herkimer	2,495	Cross-Contract
Program Alternative to School Suspension (PASS)	73,548	BOCES
Distance Learning (On-Line Courses) – Wayne-Finger Lks.	4,562	Cross-Contract
Total General Education Programs	\$1,838,078	
Total BOCES Programs	\$1,830,794	99.6%

Total Cross Contracted Programs	\$7,283	0.4%
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**BOCES SERVICES - IN ADDITION TO
CTE AND SPECIAL EDUCATION
HAMILTON-FULTON-MONTGOMERY BOCES
2008 - 2009**

SUBJECT/SERVICE	EXPENSES	HOW PROVIDED
INSTRUCTIONAL SUPPORT PROGRAMS:		
Career Assessment	\$43,629	BOCES
Elementary Science Program (ESP) – Monroe 2	40,599	Cross-Contract
Library Automation	167,236	BOCES
Instructional Resource Center (IRC)	219,092	BOCES
School/Curricular Planning – Capital Region	19,558	Cross-Contract
NERIC-Instructional Computer Support – Capital Region	290,255	Cross-Contract
Masterminds – Capital Region	2,694	Cross-Contract
Project Lead the Way – Monroe 2-Orleans	7,569	Cross-Contract
AV Equipment Repair – WSWHE	12,413	Cross-Contract
Model Schools – Capital Region	2,506	Cross-Contract
School Improvement – Franklin-Essex	1,710	Cross-Contract
Staff Development – Questar III	2,100	Cross-Contract
School/Curricular Planning – WSWHE	8,609	Cross-Contract
Instructional Services/School Improvement	283,533	BOCES
Model Schools – Eastern Suffolk	525	Cross-Contract
Printing – Madison	4,209	Cross-Contract
Total Instructional Support Programs	\$1,106,242	
Total BOCES Programs	\$713,491	64%
Total Cross Contracted Programs	\$392,751	36%

SUBJECT/SERVICE	EXPENSES	HOW PROVIDED
NON-INSTRUCTIONAL SERVICES PROGRAMS:		
Staff Development: Bus Driver	\$5,642	BOCES
School Messenger – Madison-Oneida	7,733	Cross-Contract
Central Business Office	297,282	BOCES
NERIC-Computer Services – Capital Region	1,489,942	Cross-Contract
On-Line Application System (OLAS) – Putnam	7,316	Cross-Contract
Communications Service – Capital Region	306,168	Cross-Contract
Emergency Communications System – WSWHE	1,219	Cross-Contract
Bus Driver Drug/Alcohol Testing – Jefferson-Lewis	16,745	Cross-Contract
GASB 45 Service – Capital Region	114,200	Cross-Contract
State Aid Planning – Questar	35,580	Cross-Contract
Substitute Services	150,717	BOCES
Health-Safety-Risk Management	359,296	BOCES
Risk Management – Capital Region	270	Cross-Contract
Policy Services – Erie 1	12,780	Cross-Contract
IEP Direct Software – Capital Region	24	Cross-Contract
BOLD Election Management System - Nassau	9,819	Cross-Contract
Total Non-Instructional Services Programs	\$2,814,739	
Total BOCES Programs	\$812,939	29%
Total Cross Contracted Programs	\$2,001,799	71%

Source: BOCES Data Files

**ADMINISTRATIVE BUDGET BY CATEGORY
HERKIMER-FULTON-HAMILTON-OTSEGO BOCES
2008 - 2009**

ADMINISTRATIVE EXPENSES	EXPENSES
Certified Salaries	\$289,903
Non-Certified Salaries	311,795
Equipment	12,273
Materials and Supplies	37,158
Service Contracts	126,018
General Insurances	16,720
Conference and Travel Expense	8,310
District Superintendent Meetings and Travel Expense	1,187
Professional Services	43,350
Auditors	17,000
Administrative Services	31,074
Interest on R.A.N.	63,672
Employee Benefits	220,548
Other Supplemental Benefits (Retirees Health Insurance)	1,465,886
Operations and Maintenance (Transfer)	138,236
Negotiations Services (Transfer)	16,600
TOTAL	\$2,799,730
LESS:	
Interest Earnings	(62,721)
Transfer from Special Aid-Indirect Cost	(62,801)
Miscellaneous Revenues	(37,387)
NET COST TO DISTRICTS	\$2,636,821

Source: BOCES SA-111

CAPITAL BUDGET BY CATEGORY
HERKIMER-FULTON-HAMILTON-OTSEGO BOCES
2008 - 2009

CAPITAL EXPENSES	EXPENSES
Rental Facilities	\$236,187
Capital Fund	\$166,999
Net Cost to Districts	\$403,186

Source: BOCES SA-111

**CTE COURSES, SECTIONS AND ENROLLMENTS
HERKIMER-FULTON-HAMILTON-OTSEGO BOCES
2008 - 2009**

Career and Technical Courses	Sections	Enrollment
<u>BUSINESS AND OFFICE</u>		
Computers and Networking	2	16
Integrated Office Applications	2	21
Marketing Technology (Broadcasting)	2	21
<u>HOME ECONOMICS</u>		
Early Childhood Education	2	38
<u>AUTOMOTIVE</u>		
Auto Body Repair	2	33
Auto Mechanics	2	25
Heavy Equipment Mechanics	2	26
Small Engines	2	25
<u>COMMERCIAL ART AND PRINTING</u>		
Commercial Art and Graphic Design	2	23
<u>CONSTRUCTION AND MAINTENANCE</u>		
Carpentry(includes wiring)	2	49
<u>METALWORKING</u>		
Welding Technology	2	34
<u>SERVICES</u>		
Cosmetology	2	30
Criminal Justice: Police Science, Justice Systems	2	37
<u>FOOD OCCUPATIONS</u>		
Culinary Arts	2	50
<u>HEALTH OCCUPATIONS</u>		
Nurse Assistant	2	37
<u>SPECIAL AND MISCELLANEOUS</u>		
Exploratory Occupation	4	52

TOTAL PROGRAMS OFFERED	16
TOTAL ENROLLMENT (SECONDARY)	552
TOTAL ENROLLMENT INCLUDING ADULTS	561
TOTAL SECTIONS	34
AVERAGE CLASS SIZE	17
TUITION	\$6781

Source: BOCES Data Files

**SPECIAL EDUCATION PROGRAMS, ENROLLMENTS AND TUITION
HERKIMER-FULTON-HAMILTON-OTSEGO BOCES
2008 - 2009**

OPTION	ENROLLMENT	DISTRICT/CENTER BASED CLASSROOMS	TUITION*
4220 (1:12:1)	71	4/3	\$22,625
4230 (1:6:1)	N/A	N/A	N/A
4235 (1:8:1)	38	3/3	\$23,024
4240 (1:12:3)	15	0/2	\$22,708
TOTAL	124	7/8	N/A

Source: BOCES Data Files

**BOCES SERVICES - IN ADDITION TO
CTE AND SPECIAL EDUCATION
HERKIMER-FULTON-HAMILTON-OTSEGO BOCES
2008 - 2009**

SUBJECT/SERVICE	EXPENSES	HOW PROVIDED
ITINERANT PROGRAMS:		
Visually Impaired	\$1,975	BOCES
Visually Impaired	3,920	Cross-Contract
Assistive Technology	85,772	BOCES
Speech Improvement	51,547	BOCES
School Social Worker	243,352	BOCES
Home & Careers	52,520	BOCES
Home & Careers	42,555	Cross-Contract
Music	29,923	Cross Contract
Nurse Practitioner	68,507	BOCES
Nurse Practitioner	15,479	Cross-Contract
Physician	5,850	BOCES
Physician	1,656	BOCES
Occupational Therapy	444,601	BOCES
Occupational Therapy	23,290	Cross-Contract
Physical Therapy	196,799	BOCES
Physical Therapy	7,086	Cross-Contract
Speech Impaired	413,224	BOCES
Business Manager	109,309	BOCES
Transitional Specialist	50,408	BOCES
Work Experience Coordination	2,500	Cross-Contract
Teacher Aide/Teaching Assistant	503,388	BOCES
Total Itinerant Programs	\$2,353,661	
Total BOCES Programs	\$2,227,252	95%
Total Cross Contracted Programs	\$124,753	5%

SUBJECT/SERVICE	EXPENSES	HOW PROVIDED
GENERAL EDUCATION PROGRAMS		
Gifted and Talented : Central	\$17,163	BOCES
Exploratory Enrichment	3,305	BOCES
Arts in Education	83,653	BOCES
Summer School	150,060	BOCES
Alternative Settings	6,165	Cross-Contract
Academic Programs-Program of Excellence	62,640	Cross-Contract
Alternative G.E.D.	148,110	BOCES
Alternative Education	142,115	Cross-Contract
Distance Learning	5,271	Cross-Contract
Alternative Settings	450	BOCES
Total General Education Programs	\$618,932	
Total BOCES Programs	\$402,741	65%
Total Cross Contracted Programs	\$216,191	35%

**BOCES SERVICES - IN ADDITION TO
CTE AND SPECIAL EDUCATION
HERKIMER-FULTON-HAMILTON-OTSEGO BOCES
2008 - 2009**

SUBJECT/SERVICE	EXPENSES	HOW PROVIDED
INSTRUCTIONAL SUPPORT PROGRAMS:		
Educational Communications Center	\$244,471	Cross-Contract
Library Automation	85,102	Cross-Contract
Printing	90,201	BOCES
Printing	103,062	Cross-Contract
Library Automation	17,250	Cross-Contract
Library Services	144,346	Cross-Contract
Computer Service-Instructional	1,420,666	Cross-Contract
Instructional Materials Development	143,200	Cross-Contract
Model Schools	176,453	Cross-Contract
Primary Mental Health	3,974	Cross-Contract
School/Curricular Improvement	435,520	BOCES
Total Instructional Support Programs	\$2,864,245	
Total BOCES Programs	\$525,721	18%
Total Cross Contracted Programs	\$2,338,524	82%

SUBJECT/SERVICE	EXPENSES	HOW PROVIDED
NON-INSTRUCTIONAL SERVICES PROGRAMS:		
Negotiations Services	\$74,990	Cross-Contract
Substitute Calling	28,031	BOCES
Planning Service Management	97,455	Cross-Contract
Computer Service Management	1,969,390	Cross-Contract
Telephone Interconnect	1,742	Cross-Contract
School Lunch Program	112,998	Cross-Contract
Recruitment	17,978	Cross-Contract
Substance Collection	12,683	Cross-Contract
Health Care Benefit Management	63,674	BOCES
Medicaid Reimbursement	18,262	BOCES
Central Business Office	59,168	BOCES
Records Management	23,190	BOCES
Safety/Risk Management	138,816	Cross-Contract
Workers Compensation Administration	61,805	Cross-Contract
Cooperative Bidding	54,837	BOCES
Cooperative Bidding	18,500	Cross-Contract
Staff Development: Bus Dr. & Board of Educ.	47,118	BOCES
Staff Development	33,483	Cross-Contract
Emergency Communication	47,032	Cross-Contract
Employee Assistance Program	3,410	BOCES
Total Non-Instructional Services Programs	\$2,884,562	
Total BOCES Programs	\$297,690	10%
Total Cross Contracted Programs	\$2,586,872	90%

Source: BOCES Data Files

BOCES SERVICES PURCHASED
Oppenheim-Ephratah CSD
2008-09

SUBJECT/SERVICE	BOCES	EXPENSES
<u>CAREER AND TECHNICAL</u>		
CTE	Herkimer	143,262
CTE	H-F-M	24,000
Total		\$167,262
Home BOCES		\$143,262/86%
Cross-Contract		\$24,000/14%
<u>SPECIAL EDUCATION</u>		
1:12:1 class	Herkimer	72,297
1:12:1 class	H-F-M	28,048
1:6:1 class	H-F-M	49,730
Total		\$150,075
BOCES		\$72,297/48%
Cross-Contract		\$77,778/52%
<u>ITINERANT</u>		
Occupational Therapy	Herkimer	50,164
Occupational Therapy	H-F-M	3,008
Physical Therapy	Herkimer	9,538
School Social Worker	Herkimer	3,814
Home & Career Skills	Herkimer	28,379
Total		\$94,903
BOCES		\$91,895/97%
Cross-Contract		\$3,008/3%
<u>GENERAL EDUCATION</u>		
Alternative Education	H-F-M	46,980
Arts in Education	Herkimer	6,806
Equivalent Attendance Education	Herkimer	18,711
School Boat	Herkimer	500
Total		\$72,991
BOCES		\$26,011/36%
Cross-Contract		\$46,980/64%

SUBJECT/SERVICE	BOCES	EXPENSES
INSTRUCTIONAL SUPPORT		
Library Automation	Madison-Oneida	3,835
Educational Communications	Oneida-Madison	10,699
Science Kits	Oneida-Madison	5,427
Regional Catalog	Oneida-Madison	690
CLD/Regents Prep	Madison-Oneida	2,425
Computer Service	Oneida-Madison	2,907
Printing	Oneida-Madison	1,000
Model Schools	Madison-Oneida	6,130
Instructional Technology	Madison-Oneida	2,907
Library Media	Oneida-Madison	4,067
School/Curricular Improvement	Herkimer	23,258
School Curricular Improvement	Madison-Oneida	3,105
Total		\$66,450
BOCES		\$23,258/35%
Cross-Contract		\$43,192/65%
NON-INSTRUCTIONAL		
Workers' Comp Administration	Madison-Oneida	2,294
Management Technology	Madison-Oneida	73,769
Negotiations	H-F-M	15,000
Policy Manual	Erie #1	4,100
Cooperative Purchasing	Herkimer	2,227
Energy Coordination	Onondaga-Mad-Cort	670
Board Staff Development	Herkimer	758
Safety/Risk Management	H-F-M	14,289
State Aid Planning	Questar	3,455
Records Management	Herkimer	2,678
Bus Driver Alcohol/Drug Test	Herkimer	1,050
School Communications	Oneida-Madison	504
School Communications	Alb-Sch-Sch-Sara	9,322
Recruiting	Oneida-Madison	400
Total		\$130,511
BOCES		\$6,713/5%
Cross-Contract		\$123,798/95%

BOCES SERVICES PURCHASED
St. Johnsville CSD
2008-09

SUBJECT/SERVICE	BOCES	EXPENSES
<u>CAREER AND TECHNICAL</u>		
CTE	H-F-M	72,000
Total		\$72,000
Home BOCES		\$72,000/100%
Cross-Contract		\$0/0%
<u>SPECIAL EDUCATION</u>		
1:6:1 class	H-F-M	9,532
1:8:1 class	H-F-M	139,984
1:12:3 class	H-F-M	48,039
Total		\$197,575
BOCES		\$197,575/100%
Cross-Contract		\$0/0%
<u>ITINERANT</u>		
Speech Therapy	H-F-M	28,450
Vision Teacher	H-F-M	3,010
Physical Therapy	H-F-M	22,406
Occupational Therapy	H-F-M	17,512
Work Study Coordinator	H-F-M	6,000
Guidance Counselor	H-F-M	36,736
Speech Teacher	H-F-M	14,211
Total		\$128,325
BOCES		\$128,325/100%
Cross-Contract		\$0/0%
<u>GENERAL EDUCATION</u>		
Distance Learning	H-F-M	120,934
Exploratory Enrichment	H-F-M	1,126
Arts in Education	H-F-M	9,494
Total		\$131,554
BOCES		\$131,554/100%
Cross-Contract		\$0/0%

SUBJECT/SERVICE	BOCES	EXPENSES
<u>INSTRUCTIONAL SUPPORT</u>		
Library Automation	H-F-M	2,011
Educational Communications	H-F-M	6,865
Equipment Repair	Washington-Saratoga	223
School/Curricular Improvement	H-F-M	6,905
School Curricular Improvement	Washington-Saratoga	514
Total		\$16,518
BOCES		\$15,781/96%
Cross-Contract		\$737/4%
<u>NON-INSTRUCTIONAL</u>		
State Aid Planning	Questar	2,965
Policy Manual	Erie #1	2,300
School Communications	Alb-Sch-Sch-Sara	12,719
Safety/Risk Management	H-F-M	20,672
Management Technology	Alb-Sch-Sch-Sara	59,793
Substitute Coordination	H-F-M	4,897
GASBY 45 Planning	Alb-Sch-Sch-Sara	11,200
Total		\$114,546
BOCES		\$25,569/22%
Cross-Contract		\$88,987/78%

CHANGES IN ADMINISTRATION CHARGES
H-F-M BOCES
Impact of St. Johnsville Transfer
2008-2009

District	RWADA w/ St. Johns	RWADA w/o St. Johns	Charge w/ St. Johns	Charge w/o St. Johns	Difference
Amsterdam	3,825	3,825	\$487,985	\$502,359	\$14,374
Broadalbin-Perth	2,091	2,091	\$266,765	\$274,623	\$7,858
Canajoharie	1,152	1,152	\$146,970	\$151,299	\$4,329
Edinburg	165	165	\$21,051	\$21,670	\$619
Fonda-Fultonville	1,599	1,599	\$204,000	\$210,000	\$6,006
Fort Plain	1,048	1,048	\$133,704	\$137,640	\$3,936
Gloversville	3,514	3,514	\$445,308	\$461,513	\$16,205
Johnstown	2,011	2,011	\$256,565	\$264,116	\$7,551
Lake Pleasant	93	93	\$11,861	\$12,214	\$353
Mayfield	1,173	1,173	\$149,651	\$154,057	\$4,406
Northville	452	452	\$57,662	\$59,364	\$1,702
Piseco	50	50	\$6,378	\$6,567	\$189
St. Johnsville	541	0	\$69,023	\$0	-\$69,023
Wells	157	157	\$20,032	\$20,620	\$588
Wheelerville	242	242	\$30,874	\$31,783	\$909
Total:	18,113	na	\$2,307,829	na	na
Total w/o St. Johns:	na	17572	na	\$2,307,829	\$0

Notes:

- 1) H-F-M BOCES administrative budget does not include an appropriation for accrued retiree benefits. The expense is charged within the program budgets. To establish comparability an estimate was made including an estimate of accrued benefits, the retirement incentive for 2008-09 and costs for a health care conversion. The total of approximately \$900,000 was added to the administrative budget charged based on RWADA. The data were provided by the BOCES based upon a best estimate.
- 2) Expenses for the cost of administrative services are reimbursed with BOCES administrative aid.
- 3) Cost per RWADA with St. Johnsville = \$127
Cost per RWADA less St. Johnsville = \$131

CHANGES IN CAPITAL CHARGES
H-F-M BOCES
Impact of St. Johnsville Transfer
2008-2009

District	RWADA w/ St.Johns	RWADA w/o St. Johns	Charge w/ St. Johns	Charge w/o St. Johns	Difference
Amsterdam	3,825	3,825	\$416,774	\$429,605	\$12,831
Broadalbin-Perth	2,091	2,091	\$227,836	\$234,851	\$7,015
Canajoharie	1,152	1,152	\$125,522	\$129,387	\$3,865
Edinburg	165	165	\$17,978	\$18,532	\$554
Fonda-Fultonville	1,599	1,599	\$174,228	\$179,592	\$5,364
Fort Plain	1,048	1,048	\$114,191	\$117,706	\$3,515
Gloversville	3,514	3,514	\$382,887	\$394,675	\$11,788
Johnstown	2,011	2,011	\$219,120	\$225,866	\$6,746
Lake Pleasant	93	93	\$10,134	\$10,445	\$311
Mayfield	1,173	1,173	\$127,811	\$131,746	\$3,935
Northville	452	452	\$49,250	\$50,766	\$1,516
Piseco	50	50	\$5,448	\$5,616	\$168
St. Johnsville	541	0	\$58,947	\$0	-\$58,947
Wells	157	157	\$17,107	\$17,633	\$526
Wheelerville	242	242	\$26,369	\$27,180	\$811
Total:	18,113	na	\$1,973,602	na	na
Total w/o St. Johns:	na	17,572	na	\$1,973,602	\$0

Notes:

- 1) H-F-M BOCES had a referendum and residents approved a lease, following special legislation allowing a 30 year term, with the Montgomery County Industrial Development Agency, for construction of an educational center located on the campus of Fulton-Montgomery Community College. The payments began in the 2005-2006 school year and end in 2034. The initial annual payment was \$1,598,570 increasing gradually until the final annual payment is \$2,152,100. The expense is eligible for BOCES facilities aid, based on each district's RWADA Aid Ratio. St. Johnsville has a ratio of .825. It's 2008-2009 cost share of \$47,746 received \$39,390 in aid, with a local share of \$8,356.
- 2) Included in the above total is \$375,032 in classroom lease expense which is also part of the BOCES capital budget. This expense also receives BOCES facilities aid.
- 3) Cost per RWADA with St. Johnsville = \$109
Cost per RWADA less St. Johnsville = \$112

CHANGES IN ADMINISTRATION CHARGES

Herkimer BOCES

Impact of Oppenheim-Ephratah Transfer

2008-2009

District	RWADA w/ Opp	RWADA w/o Opp	Charge w/ Opp	Charge w/o Opp	Difference
Dolgeville	926	926	\$178,682	\$186,346	\$7,664
Frankfort-Sch	1,260	1,260	\$243,264	\$253,560	\$10,296
Herkimer	1,302	1,302	\$251,393	\$262,012	\$10,619
Ilion	1,775	1,775	\$342,918	\$357,197	\$14,279
Little Falls	1,225	1,225	\$236,524	\$246,516	\$9,992
Mohawk	937	937	\$180,988	\$188,560	\$7,572
Mount Markham	1,456	1,456	\$281,133	\$293,002	\$11,869
Oppenheim-Eph	488	0	\$94,109	\$0	-\$94,109
Owen D. Young	283	283	\$54,604	\$56,950	\$2,346
Poland	772	772	\$148,942	\$155,356	\$6,414
Richfield Springs	680	680	\$131,275	\$136,842	\$5,567
West Canada	931	931	\$179,862	\$187,352	\$7,490
Total:	12,035	na	\$2,323,694	na	na
Total w/o Opp:	na	11547	na	\$2,323,694	\$0

Notes:

- 4) The Herkimer BOCES administrative budget includes \$1,463,886 which is a complete accounting of the cost for accrued retiree benefits.
- 5) The administrative budget includes charges for an Energy Performance Contract to achieve energy economies. It is an annual appropriation of \$198,432 charged on an RWADA basis, through the 2020-2021 school year.
- 6) Expenses for the cost of administrative services are reimbursed with BOCES administrative aid.
- 7) Cost per RWADA with Oppenheim-Ephratah = \$193
Cost per RWADA less Oppenheim-Ephratah = \$201

CHANGES IN CAPITAL CHARGES
Herkimer BOCES
Impact of Oppenheim-Ephratah Transfer
2008-2009

District	RWADA w/ Opp	RWADA w/o Opp	Charge w/ Opp	Charge w/o Opp	Difference
Dolgeville	926	926	\$144,076	\$150,169	\$6,093
Frankfort-Sch	1,260	1,260	\$196,039	\$204,333	\$8,294
Herkimer	1,302	1,302	\$202,575	\$211,144	\$8,569
Ilion	1,775	1,775	\$276,185	\$287,850	\$11,665
Little Falls	1,225	1,225	\$190,608	\$198,657	\$8,049
Mohawk	937	937	\$145,798	\$151,953	\$6,155
Mount Markham	1,456	1,456	\$226,543	\$236,118	\$9,575
Oppenheim-Eph	488	0	\$75,932	\$0	-\$75,932
Owen D. Young	283	283	\$44,024	\$45,894	\$1,870
Poland	772	772	\$120,125	\$125,195	\$5,070
Richfield Springs	680	680	\$105,801	\$110,275	\$4,474
West Canada	931	931	\$144,862	\$150,980	\$6,118
Total:	12,035	na	\$1,872,568	na	na
Total w/o Opp:	na	11,547	na	\$1,872,568	\$0

Notes:

- 1) Herkimer BOCES had a referendum and residents approved a capital project for \$14,200,000 for renovations of the educational center in East Herkimer. The payments began in 2009-2010 and end in 2025, funded through the New York State Dormitory Authority. In order to establish comparability, the debt payment of 2009-2010 has been included in the 2008-09 data for Herkimer BOCES. The initial annual payment was \$1,766,063 decreasing gradually until the final payment is \$1,455,900. The expense is eligible for BOCES facilities aid, based on each district's RWADA Aid Ratio. Oppenheim-Ephratah has a ratio of .796. It's 2009-2010 cost share of \$71,614 received \$50,392 in aid, with a local share of \$21,222.
- 2) Included in the above total is \$106,303 in classroom lease expense which is also part of the BOCES capital budget. This expense also receives BOCES facilities aid.
- 3) Cost per RWADA with Oppenheim-Ephratah = \$156
Cost per RWADA less Oppenheim-Ephratah = \$162

ANALYSIS AND COMMENT: BOCES SERVICES

ANALYSIS:

It was stated in the INTRODUCTION that the primary criterion for the Commissioner's decision is that his action will seek to promote the best educational interests of the area. There is the question of what is in the best educational interest of the potentially reorganized Oppenheim-Ephratah-St. Johnsville Central School District (the District) and what is in the best educational interest of each of the affected BOCES: Herkimer-Fulton-Hamilton-Otsego (Herkimer) and Hamilton-Fulton-Montgomery (H-F-M). The first question to be addressed is that of the District's educational interest since that is the reason for which the study is being undertaken. Both educational and financial elements were listed in the INTRODUCTION for consideration. Everyone would probably agree the educational elements are the most important ones and the reorganization will only be approved if residents are convinced that significant educational enhancements will occur. Therefore, we will review the programs of the two BOCES and specify those which Oppenheim-Ephratah and St. Johnsville subscribed to in 2008-09.

Every BOCES operates a Career and Technical Education (CTE) program. CTE is a major program for eleventh and twelfth graders, especially in rural areas. Often an average of twenty-five percent of students in smaller districts in areas with lower density will attend BOCES CTE.

The Herkimer program is located on a campus in East Herkimer that is currently undergoing extensive renovations. There were 16 programs (one was an exploratory enrichment class for ninth and tenth graders) and a tuition of \$6781 in 2008-09. The H-F-M program is located in a newly constructed facility on the grounds of Fulton-Montgomery Community College. There were 17 programs (one was a licensed practical nursing course for adults) and a tuition of \$7604. (The tuition at H-F-M is higher than Herkimer in part because it includes part of the \$900,000 in accrued retiree benefits which are accounted for in Herkimer in the administrative budget. There is more detail on this in the section in the study on the Administrative and Capital Budgets.) The CTE programs of the two BOCES are quite similar: the general array of programs is typical for smaller enrollment BOCES and the tuitions were below the State average.

In 2008-09 Oppenheim-Ephratah sent 24 students to Herkimer BOCES for CTE and St. Johnsville sent 9 to H-F-M. For Oppenheim-Ephratah this was about 36 percent of their eleventh and twelfth graders while for St. Johnsville it was 14 percent.

In the fall of 2011 H-F-M is starting a two year program with the Community College using their labs and "clean" room and a \$650,000 grant from the National Science Foundation to create an Engineering Technology Program. Students will receive school and college credits and prepare for jobs at GlobalFoundries. The program would likely not occur without the co-location with the college. This is the only BOCES to operate such a program at this time.

The high school for the new District is proposed to be in St. Johnsville which is currently in H-F-M BOCES. The CTE Center of H-F-M is 22 miles and 31 minutes in travel and the CTE Center for Herkimer is 17 miles and 22 minutes.

Special Education Services of BOCES are provided for students with additional educational needs based on four combinations of staffing ratios referred to as “options”. Some of the classes are located at the BOCES campus and some are in classrooms which BOCES rents from local districts.

Both BOCES offer a similar array of special education programs in that they both operate three of the four options. H-F-M also operates the 1:6:1 (4230) option which Herkimer does not. Tuitions between the two BOCES are similar. (However, if the accrued retiree benefits of H-F-M were in the administrative budget, as they should be and are in Herkimer, tuitions would be lower in H-F-M because the expense would be subtracted).

In special education services in 2008-09 Oppenheim-Ephratah had one student enrolled in a program at Herkimer BOCES and sent two students to a program operated by H-F-M. St. Johnsville had four students at H-F-M.

Itinerant services in BOCES are the sharing of a staff person between two or more districts or a district and BOCES. This area of BOCES service is used more often by small rural schools which can benefit from a shared staff person in some areas due to small numbers.

Oppenheim-Ephratah used a shared home and career skills teacher in 2008-09. St. Johnsville used a shared speech therapy teacher, a speech teacher and a guidance counselor. Both districts used shared occupational and physical therapy from their respective BOCES. Both H-F-M and Herkimer BOCES provide adequate itinerant services. They have a long history of doing so and will continue to.

BOCES general education services can provide critical instructional and enrichment opportunities to supplement district programs. In this area and those that follow, the size of the BOCES enrollment base supporting programs has a significant impact on their array and breadth. It often becomes necessary to use cross-contracting in small enrollment BOCES to round out their local offerings.

In the Herkimer BOCES in 2008-09 there were six programs: a GED alternative education program for students who had left school; a gifted and talented seminar; a summer school; a small summer enrichment class; arts-in-education; and “Erie Canal Boat”. Starting in 2010-11 there is credit recovery using distance learning. In H-F-M there were four services: alternative education as a full-day high school program for students at risk; alternative education for grades six through twelve that is short-term for students in suspension; distance learning, which is an extensive program to share instruction between two or more districts; exploratory enrichment and arts-in-education. A summer school service was added in 2009-10.

Oppenheim-Ephratah subscribed to alternative education at H-F-M for four students and GED for three students at Herkimer and also subscribed to arts-in-education and “School Boat” at Herkimer. The major expense, 64%, was to H-F-M for alternative education. St. Johnsville subscribed to a significant amount of distance learning from H-F-M for 2009-10: \$120,934 for

courses to add to their instructional program. They also purchased exploratory enrichment and arts-in-education.

The instructional support category of BOCES services provides programs including instructional technology, library media, and educational communications to enhance learning and extensive staff and curriculum development and training to aid teachers.

In 2008-09 Herkimer BOCES operated two services – printing and a \$435,000 school/curricular improvement service for teacher training. H-F-M had four services: a small career assessment piece; library automation; educational communications; and a \$280,000 school/curricular improvement service.

Oppenheim-Ephratah subscribed to school improvement from Herkimer but also purchased a number of services from two neighboring BOCES: Madison-Oneida and Oneida-Madison – library automation; educational communications; model schools; and instructional technology, among others. St. Johnsville subscribed to library automation; educational communications; and school improvement from H-F-M. There was some very minor service from Washington-Saratoga.

The non-instructional service area provides BOCES services to assist district management functions including business and personnel office, transportation and school food services. The Regional Information Center service is also in this group. It is the only service which is limited to twelve designated BOCES across the state and to which groups of districts are assigned. It includes administrative computers, student scheduling and related tasks.

Herkimer BOCES operated nine services in 2008-09: substitute calling; health care benefit management; Medicaid reimbursement; central business office; records management; bus driver testing; cooperative bidding; board of education workshop; and employee assistance. H-F-M operated four programs: substitute calling; bus driver testing; central business office; and safety-risk management.

Herkimer BOCES has a considerably larger array of services than H-F-M in this group. However, a few have small budgets and are not comprised of many staff: bus driver testing; Medicaid reimbursement; and employee assistance.

St. Johnsville subscribed to two services from H-F-M in 2008-09: safety-risk management and substitute coordination. The district also bought some services on cross-contract: state aid planning from Questar and a policy manual from Erie #1, among others. St. Johnsville is a member of the Regional Information Center at the Albany-Schoharie-Schenectady-Saratoga BOCES and subscribed to approximately \$60,000 for management technology. Oppenheim-Ephratah subscribed to four services from Herkimer in 2008-09: cooperative purchasing; board staff development; records management; and bus driver testing. The district also bought some services on cross-contract: the same state aid planning and policy manual that St. Johnsville did. Oppenheim-Ephratah is a member of the Regional Information Center at Madison-Oneida BOCES and subscribed to approximately \$73,700 for management technology.

COMMENTS:

- The CTE programs of the two BOCES were quite similar based upon the 2008-09 data; the array of courses was typical for smaller enrollment BOCES.
- The new Engineering Technology program at H-F-M will be a significant addition to their CTE program and would be available to St. Johnsville-Oppenheim-Ephratah students if the new District were in H-F-M BOCES.
- The St. Johnsville high school is five miles and nine minutes closer in travel to the Herkimer Center than the H-F-M Center.
- The special education services of the two BOCES are fairly similar although H-F-M operates all four available options and Herkimer operates three. Oppenheim-Ephratah sent two of its three special needs students to H-F-M BOCES by cross-contract in 2008-09.
- The itinerant services of both BOCES are plentiful and would be readily available to the new District in either BOCES.
- In the general education service area the array of services is somewhat similar. However, H-F-M operates a full day alternative education program for at-risk students which Herkimer does not. Both do arts-in-education. The distance learning service is used by St. Johnsville currently with six others to share about fifteen courses. There is no comparable service in Herkimer.
- The instructional support area of service in H-F-M is also a more developed one than is the case of Herkimer with four services to Herkimer's two. Herkimer has, however, a very large budget for staff and curriculum development - \$435,000.
- Herkimer has twice as many services as H-F-M in the non-instructional area, although a few have very small budgets. H-F-M has a large safety-risk management service. Herkimer has a long-standing cooperative bidding and health care benefits management, among others.

ANALYSIS AND COMMENT ADMINISTRATIVE AND CAPITAL BUDGETS

ANALYSIS:

BOCES administrative and capital budgets are separate from services. In accordance with statute all of the districts which are members of a BOCES pay for the cost of the administrative and capital function based upon a pupil or property count. All of the BOCES in the state except one use the pupil count called RWADA – Resident Weighted Average Daily Attendance. The administrative budget includes the Office of the District Superintendent, assistants who have general oversight responsibilities, the BOCES business and personnel functions, BOCES board costs, and accrued retirement benefits of all BOCES staff who retire with benefits. The capital budget includes money for any annual appropriations for capital projects, appropriations such as with the Dormitory Authority of the State of New York and leases. Capital expenditures are allocated in the same manner as administration: that is, on an RWADA pupil count basis.

In 2008-09 in the Herkimer BOCES the administrative charge per pupil (RWADA), including both administration expenses and an energy performance contract which the BOCES has entered into for achieving energy economies, was \$193 based on the data the BOCES provided the State Education Department. Oppenheim-Ephratah's share was \$94,109.

In the capital budget, the Herkimer BOCES conducted an area-wide referendum in December, 2008 and residents approved a project for \$14,200,000 for major renovation of the buildings which make up the educational center in East Herkimer. The payments began in 2010-11 and end in 2024, funded through the Dormitory Authority of New York State. The debt payment of 2010-11 has been included in the 2008-09 data to establish comparability. Herkimer BOCES, like most others, also rents some space, primarily for special education classrooms, in districts. The amount was \$106,303 in 2008-09. The total capital cost per RWADA was \$136. Oppenheim-Ephratah's share was \$75,932.

In H-F-M BOCES the administrative charge per RWADA is calculated to be \$127. The administrative budget does not include the costs attributable to the accrued retirement benefits of all staff who are eligible to retire with benefits. BOCES accounting rules require these charges to be in the administrative budget rather than service (CO-SER) budgets because services are established on an annual basis and can cease to exist if there are no districts to subscribe. In that case there is no budget in which to preserve the retirement benefits of the staff who provided the services. BOCES has no statutory authority to establish a reserve for benefits. With the aid of staff in H-F-M BOCES, an estimate of the cost of accrued benefits which are currently budgeted in the services (CO-SERs) has been made (\$900,000) and added to the administrative budget. St. Johnsville's share for administration was \$69,023.

In the capital budget, the H-F-M BOCES conducted an area-wide referendum in June 2004. Special legislation had been approved in August, 2003 allowing the BOCES to enter into a thirty year lease. (Ten year is the maximum allowed by regular statute.) The lease is with the Montgomery County Industrial Development Agency. The payments began in 2005-06 and end in 2034. H-F-M BOCES also has rentals for special education classes. The amount in 2008-09 was \$373,032. The total capital cost per RWADA was \$109. St. Johnsville's share was \$58,947.

COMMENT:

1. Administrative budget charges are higher in Herkimer BOCES than in H-F-M. They are much higher currently (\$220 per RWADA to \$77 per RWADA based upon the BOCES Chapter 602 2008-09 Report). They are also higher when some accounting for accrued retiree benefits has been added to the cost in H-F-M on the assumption that the BOCES will begin accounting for benefits in the preferred manner (\$193 per RWADA to \$127 per RWADA).
2. Based on 602 Report data calculations, it would cost the new District \$226,380 in Herkimer for administration compared to \$79,233 in H-F-M or with comparable accrued benefits, \$198,597 to \$112,161.
3. Capital charges are higher in Herkimer BOCES than in H-F-M: \$156 per RWADA to \$109 per RWADA for 2008-09. It would cost the new District \$160,524 in Herkimer compared to \$112,161 in H-F-M.
4. The project in Herkimer BOCES will be complete in 2024 while that of H-F-M goes to 2034, ten more years of payments.
5. It has been determined by the State Education Department, based on research by staff, that if the new District were to be in H-F-M BOCES, there would be no responsibility for any capital indebtedness between the former Oppenheim-Ephratah District or the new District and the Herkimer BOCES for the building project. If the decision were to place the new District in Herkimer BOCES, it would be responsible for paying the expense attributable to the BOCES building project based on its RWADA. The same will apply in paying the lease expense in H-F-M BOCES, although it was never a question. There was a lack of certainty when Oppenheim-Ephratah and St. Johnsville began their initial discussions which is now resolved.
6. Both facilities should serve students very well when the renovations which are in process currently in Herkimer BOCES are completed.

ANALYSIS AND COMMENT: BOCES IMPACT

Both the H-F-M and the Herkimer BOCES are in the bottom third of the State's thirty-seven BOCES based upon the size of their enrollment base. Both have been studied in-depth for possible combining together as a single BOCES in recognition of their problematic student base. H-F-M was 11th from the bottom or 22nd overall. Herkimer was 4th – 34th overall. Enrollment matters a great deal in a regional service agency because there needs to be enough base to create a demand for a variety of educational services to extend and enhance the programs of component districts. There also must be enough enrollment – RWADA – to support the administrative function of the BOCES. There are certain staff and functions which must be present to operate the Office of the District Superintendent and the functions of the Cooperative Board regardless of size. Enrollment also matters in a very significant way in these two BOCES beyond districts being able to pay for services and the administrative function. Both of these BOCES have recently engaged in large capital projects with significant terms of repayment.

There are two elements to consider: the first is programs. What would be the impact in either BOCES, in relation to the remaining student base, and thus support for programs and services, if a district were transferred to the other BOCES as a result of the new District being located in that BOCES?

With Oppenheim-Ephratah, Herkimer BOCES had a component base of 12 districts and a student base of 10,947 (2008-09 data). Without the District, it would have 11 districts and a 10,554 base. It would rank the same. With St. Johnsville, H-F-M BOCES had a component base of 15 districts and a student base of 16,666. Without the District, it would have 14 districts and a 16,214 base. It would rank 9th from the bottom or 27th overall.

The change in enrollment base whether the new District were to be located in H-F-M BOCES or Herkimer is likely not so significant as to have major impact overall on programs, especially long-range. An individual program will have some affect such as CTE in Herkimer in which Oppenheim-Ephratah enrolls a large number of students. The distance learning service in H-F-M would be impacted similarly if St. Johnsville were not able to participate. However, a shift of approximately 400 students and one district either way is not likely to cause disruption or growth of services.

The other element is the financial one. Program costs in CTE could have some impact as students from either Oppenheim-Ephratah or St. Johnsville attended at a center different from previously, at least in the near-term. Other program areas would be less impacted. Oppenheim-Ephratah sends most of its special needs students to H-F-M currently. The other program area of either BOCES that has a large participation by one of the districts and, therefore could have a financial impact if there were a change, is St. Johnsville's participation in the seven district distance learning group in the H-F-M service.

Administrative costs would change as a result of transferring the RWADA base of either district from its current BOCES. With Oppenheim-Ephratah, Herkimer BOCES had an administrative charge per RWADA of \$193 based upon 2008-09 data provided by the BOCES.

Included is the cost for administration and an energy performance contract. Oppenheim-Ephratah had 488 RWADA and accounted for \$94,109 of the expense. Without the district, the charge per RWADA would increase to \$201, a difference of \$8. The increase for the remaining districts would range from \$2,346 to \$14,279.

With St. Johnsville, H-F-M BOCES had an administrative charge per RWADA of \$127 based upon 2008-09 data provided by the BOCES (including estimated accrued retiree benefits). St. Johnsville had 541 RWADA and accounted for \$69,023 of the expense. Without the district, the charge per RWADA would increase to \$131, a difference of \$4. The increase for the remaining districts would range from \$353 to \$16,205.

Capital costs would also be affected from the transferring of the RWADA base of either district from its current BOCES in a like manner. With Oppenheim-Ephratah, Herkimer BOCES had (based on adding the 2009-10 referendum payment cost to the 2008-09 data) a capital charge per RWADA of \$156 based on data provided by the BOCES. With their 488 RWADA, Oppenheim-Ephratah accounted for \$75,932 of the expense. Without the district, the charge per RWADA would increase to \$162, a difference of \$6. The increase for the remaining districts would range from \$1,870 to \$11,665.

With St. Johnsville H-F-M BOCES had a capital charge per RWADA of \$109 based on data provided by the BOCES. With their 541 RWADA, St. Johnsville accounted for \$58,947 of the expense. Without the district, the charge per RWADA would increase to \$112, a difference of \$3. The increase for the remaining districts would range from \$168 to \$12,831.

COMMENTS:

- The difference in enrollment between Oppenheim-Ephratah and St. Johnsville (393 to 452 in 2008-09) is not sufficiently great that a shift either from one BOCES to the other would make a material difference in terms of where the new District is located.
- It is understandable that Herkimer BOCES with 6,112 fewer students than H-F-M and 3 fewer districts, would prefer to gain 452 students rather than lose 393 if the new District were located in Herkimer BOCES.
- Locating the new District in H-F-M BOCES would result in lower administration costs. Based on 2008-09 data (included in the total RWADA for determining the expense was that of the combined Oppenheim-Ephratah-St. Johnsville District in calculations for both Herkimer and H-F-M BOCES) it would cost \$127,596 in H-F-M and \$190,365 in Herkimer.
- The impact on the remaining districts in the respective BOCES is greater in the Herkimer BOCES if Oppenheim-Ephratah is transferred from it because it has the higher costs per RWADA initially.

- Locating the new District in the H-F-M BOCES would also result in lower capital costs. Based on 2008-09 data it would cost \$109,074 in H-F-M BOCES and \$153,321 in Herkimer BOCES.
- Capital costs in both BOCES for most districts are aided at a very high rate: Oppenheim-Ephratah has a .80 ratio and St. Johnsville has a .83 ratio. For example, St. Johnsville's 2008-09 share of the campus lease expense of \$47,746 received \$39,390 in aid (which is paid in the current year) and the district's cost was \$8356. The ratios in Herkimer range from 39% to 87% and in H-F-M from 45% to 87%, with three districts not eligible.

MATRIX OF LETTERS
REGARDING OPPENHEIM-EPHRATAH-ST. JOHNSVILLE BOCES LOCATION
H-F-M BOCES

Districts	Responded	Supports Location in H-FM	Primary Reason – Programs	Primary Reason - Finance
Amsterdam	√	√	√	
Broadalbin-Perth	√	√	√	
Canajoharie				
Edinburg	√	√	√	
Fonda-Fultonville	√	√	√	
Fort Plain				
Gloversville	√	√	√	
Johnstown	√	√	√	
Lake Pleasant				
Mayfield	√	√	√	
Northville				
Piseco				
St. Johnsville	√	√	√	
Wells				
Wheelerville				
Total:	8	8	8	0

Others

Dist. Supt. of BOCES	√	√	√
Pres. of BOCES Board	√	√	√
Pres. of Ful-Mont Comm. College	√	√	√

MATRIX OF LETTERS
 REGARDING OPPENHEIM-EPHRATAH-ST. JOHNSVILLE BOCES LOCATION
 Herkimer BOCES

Districts	Responded	Supports Location in Herkimer	Primary Reason – Programs	Primary Reason - Finance
Bridgewater-West Winfield				
Dolgeville				
Frankfort				
Herkimer				
Ilion	√	√		√
Little Falls				
Mohawk				
Oppenheim-Ephratah				
Poland	√	√		√
Richfield Springs				
Van Hornsville (ODY)				
West Canada Valley	√	√		√
Total:	3	3	0	3

Others

Dist. Supt. of BOCES	√	√		√
Pres. of BOCES Board	√	√		√

SUMMARY OF THE CORRESPONDENCE

- Eight of the fifteen component districts in the H-F-M BOCES provided a letter in regard to the decision about the location of the new District, including St. Johnsville.
- Among the points made by the H-F-M districts was that the co-location with the college was going to create a special program, Engineering Technology, that would benefit the new District; there is an ongoing advantageous curricular relationship with the college; the BOCES Business Education Alliance service enhances student learning and local business relationships.
- One district pointed out that Oppenheim-Ephratah is the only district in Fulton County which is not part of H-F-M BOCES; thus the county relationship would be strengthened if the new District, including the Oppenheim-Ephratah portion, were in H-F-M BOCES.
- The letters of the District Superintendent of the BOCES and Board President echoed these same points. The relationship with the college is unique and of great importance; developing training for students to meet the jobs available at GlobalFoundries presents special opportunities; and this BOCES, as opposed to Herkimer, has the Tech Valley aspect of the capital district to offer to the students of the new District.
- A letter received from the President of Fulton-Montgomery Community College emphasized the unique partnership of the BOCES and the college; the collaboration with the schools, industry, chambers of commerce and economic development officials of the counties; support for the district reorganization and for placement of the new District, should it take place, in H-F-M BOCES.
- Three of the twelve component districts in Herkimer BOCES provided a letter in regard to the decision about the location of the new District. Oppenheim-Ephratah did not provide a letter.
- Two districts presented data that it was a shorter travel time and distance from St. Johnsville high school to the Herkimer center and shorter travel for some special education classes. The primary point made by all was financial. The financial impact of the loss of Oppenheim-Ephratah's share of the BOCES could negatively impact these districts' ability to support programs according to the statements each made.
- The letters of the District Superintendent of the BOCES and the Board President make these same points: the CTE of Herkimer is closer in miles and time to St. Johnsville than H-F-M. The offerings between the two BOCES are quite similar. The most compelling reason to locate the new District in Herkimer BOCES is financial impact. The financial impact of losing Oppenheim-Ephratah's share of the BOCES would be a hardship.