

Learning Design Associates  
12765 Beach Avenue  
Silver Creek, NY 14136  
December 5, 2016

Dr. David O'Rourke, District Superintendent  
Erie 2-Chautauqua-Cattaraugus BOCES  
8685 Erie Road  
Angola, NY 14006

Dear Dr. O'Rourke:

Enclosed please find three (3) copies of the Detailed Proposal which includes the Technical Proposal, and three (3) copies of the Dollar Cost Bid Proposal to meet the requirements for the submission of proposals for the purpose of centralization of the Clymer Central School District and the Panama Central School District.

The Technical Proposal includes our understanding of the work to be done, including data collection, the use of focus groups, the use of a Feasibility Study Committee, and the presentations and the distribution of information to the public and to the respective boards of education. The proposal also contains a proposed timeline, with a rationale for this particular timeline, which will be followed.

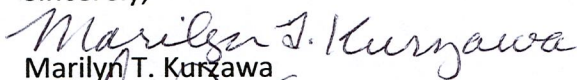
As consultants and former school district staff members, we believe that our team has the greatest expertise and skills to conduct this study. Not only have one or more of us conducted other studies, the three main consultants live and have worked in Chautauqua County, sensitizing us to some of the subtle differences between schools in our region and in other areas.

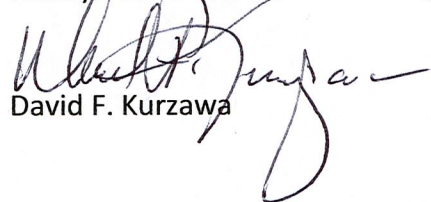
In addition, we have extensive experience facilitating groups, and in particular, focus groups. The use of focus groups in this study allows the collection of perception data since it uses a standardized process that follows a format that the investigators designed for other studies.

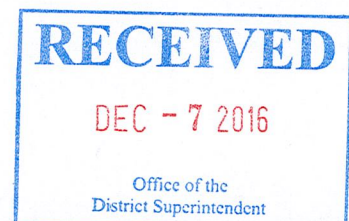
This proposal is a firm and irrevocable offer for the services to be rendered.

Please do not hesitate to contact one of us should there be questions about our proposal. We can be reached at 934-9543 or 863-4475.

Sincerely,

  
Marilyn T. Kurzawa

  
David F. Kurzawa



**Learning Design Associates, Inc.**

*NYS School Consulting Services*

12765 Beach Avenue

Silver Creek, NY 14136

716-934-9543/716-863-4475

**Proposed Feasibility Study  
For the Purpose of Centralization  
of  
Clymer Central School District  
and  
Panama Central School District**

Submitted by:

**Learning Design Associates, Inc.**

Senior Consultants:

David F. Kurzawa

Marilyn T. Kurzawa

Additional Consultants:

Thomas W. Schmidt

Roy McMasters

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**Note: Information on proposed consulting fees is contained in separate envelope, per RFP instructions.**



## **I. Proposal for Study Services**

The proposal submitted provides a description of the work to be completed by Learning Design Associates in its efforts to assist the respective Boards of Education of Clymer Central School District and Panama Central School District make a well-reasoned and documented decision about pursuing a reorganization of the two school districts. The proposal describes the people and the processes to be used in the feasibility study.

### ***Consultants***

#### **David Kurzawa**

As co-investigator for this project, Dave most recently served as Interim Superintendent of Pine Valley Central Schools from 2014-2015. Other interim positions include service for the Silver Creek Central School District (three times); Southwestern Central School District; Holland Central School District; Frontier Central School District. In each district, Dave led the reorganization of the boards of education; districts' operations, including curriculum and instruction, finance, transportation, community relations, personnel, and business. He also served as Interim Business Official for Springville-Griffiths Institute. In all districts he has served, he has led the development of capital projects and school budgets, and he served as lead negotiator for the settlement of innovative union contracts.

Dave retired as superintendent of the Pioneer Central School District, a merged district, in 2002, after serving the district for 22 years, first as Assistant Superintendent for Curriculum, then for Business, prior to assuming the role of Superintendent. Following his retirement, he joined Learning Design Associates to provide consulting services to school districts and other agencies. In addition to his interim positions, Dave has worked as consultant to the Seneca Nation of Indians' Education Department, guiding them in planning for their future; and to Washington- Saratoga-Warren-Hamilton-Essex BOCES to assist their component districts in planning for the future with technology.

Dave's experience and expertise is frequently sought by school leaders for a wide variety of topics. As the Pioneer Superintendent, he developed the concept and implementation of a shared business office, the first in WNY. He worked with the teachers' union to implement contracts that focused on teacher learning to improve instruction. Other topics include maximizing state aid to reduce tax levies; community involvement in schools; planning for and using technologies to improve learning; computerizing business offices; mentoring new superintendents and candidates for the superintendency.

Dave is a resident of Chautauqua County and is interested in the educational outcomes of students and their schools in our area.



## **Marilyn (Gates) Kurzawa**

As a second co-investigator for this project, Marilyn has been a consultant with Learning Design Associates since its inception in 2001. She specializes in long-range planning, school board development and evaluation, and data analysis. She retired from the position of Director, Learning and Technology Services, Erie 1 BOCES, a division that she was privileged to create in 1994. This position also included serving as Co-Director of the Western New York Regional Information Center at Erie 1 BOCES. These two divisions delivered technology services and staff and curriculum development services to 100 school districts in Western New York. Prior to that work, she was an assistant superintendent for curriculum and instruction. She is now semi-retired from Learning Design Associates but is still interested in district merger studies.

As a facilitator, Marilyn has guided the long-range planning efforts of 18 school districts and four not-for-profit organizations. She has developed a perception survey and then interviewed key informants for a private school's capital project, and she has facilitated a variety of projects for the Seneca Nation of Indians. Her experience and expertise are often requested to facilitate difficult discussions between competing ideas, as well as long-range planning projects, and board of education goal setting sessions.

Several recent clients include Brocton Central School District; Brocton-Westfield Merger Study; Erie 2-Chautauqua BOCES; Olean City School District Re-Organization Study.

Marilyn resides in Chautauqua County and follows school news with interest.

Both David and Marilyn have worked in merged districts and understand first hand the challenging factors involved in making the decision to merge or remain unique districts.

**Learning Design Associates, Inc.** was founded in 2001 and has 2 primary consultants, with others added as the work requires. The office is located in Silver Creek, NY. State-of-the-art technology tools are used to complete the work done for many school districts. When necessary, typists are hired to complete major projects, and other consultants can be brought in to develop components of the work that are outside their own areas of expertise.

## **Thomas Schmidt**

Tom has had many experiences in the educational community. Most recently, he served as the interim Executive Director of the Robert H. Jackson Center in Jamestown, NY. In that position, Tom was responsible for reorganizing the Jackson Center and creating and managing programs that were on the local, national and international levels. Since leaving the interim position, he has been asked to sit on the Board of the Center and is currently the chair of the Operations Committee.

Prior to that, Tom was the interim superintendent of the Cassadaga Valley School District. There he was responsible for reorganizing the administrative makeup of the



school district. This included hiring of two new administrators. He was also responsible for settling a contract with the Teacher's Association that had not been settled in over two years. Tom also worked as a consultant with David and Marilyn on a previous project.

Prior to his retirement, Tom was the superintendent of the Sherman Central School District. Under his leadership, the district was able to move from a position of fiscal instability to one with a healthy fund balance, a balanced budget and level tax levies. Also during his tenure, the district was recognized as a National Blue Ribbon School. In addition, the district was recognized year after year as the number one "Over Achieving School District" in Western New York by Buffalo Business First.

Tom's 39-year educational career included being the Assistant Superintendent of the Depew Union Free School District, an elementary principal in the Jamestown and Bemus Point School Districts, Program Coordinator for the Chautauqua County Teacher's Center and a first and second grade teacher in the Randolph School District.

Tom's volunteer work includes being a member of the Board of Directors for the United Way of Southern Chautauqua County where he was a past chair of the annual United Way campaign; member of the board of The Robert H. Jackson Center and chair of the Operations Committee; and Communications Coordinator for the Mission Of Peace of the United Methodist Church.

Tom is a resident of Chautauqua County and will be available for all stages of the study process. His knowledge of rural districts, similar to Clymer and Panama, will be a benefit to this study.

**Roy McMaster**, Vice President, Capital Market Advisors, LLC

Roy oversees the CMA Southern Tier office in Elmira, NY. His career began in 1976 working with all types of New York municipalities including towns, villages, and specializing in school districts. In addition to the financial advisor services related to planning, marketing and managing over three billion in municipal borrowings, Roy also provides complete budget services for towns or villages and completion and electronic filing of the AUD (Annual Update Document. School district services include pre-vote tax analysis and public presentations related to referendum votes; capital project planning work sessions; financial analysis and aid projections for 26 merger studies; cohort survival enrollment projections; Debt Consent Order applications to the Board of Regents and State Comptroller; and completion of the various State Aid forms specific to building project financing.

Districts for which Roy has participated in merger studies include the following from a list of 26:

Ripley-Westfield; Jasper/Troopsburg; Allegany/Limestone; Chautauqua/Mayville; Cattaraugus/Little Valley; Scio/Friendship; Ripley-Westfield; Brocton-Westfield.



### **Central Issues**

The central issues to be examined as the background to this feasibility study are as follows:

**Is it possible to enhance or improve educational outcomes for all students, including student success in school as measured by achievement data, graduation rates, drop-out rates and post-graduation plans, at similar or reduced costs to taxpayers if the two districts were centralized?**

**Would student post-graduation outcomes be improved if there were a wider range of courses available and staff with different areas of expertise to teach them?**

### **Issues to Be Studied and Methodology**

Using the central issues as the filter for all information gathered through the analysis of **student achievement data, perception data, demographics, and school process data**, a picture of the existing districts will be drawn from the data and activities listed below. Included in this list are all categories listed in the Request for Proposals, plus additional issues that, in our experience, are of central interest in the operation of a school district and to taxpayers.

A Feasibility Study Committee (see pages 9-10), composed of various constituent groups' representatives, will be guided by consultants David and Marilyn Kurzawa, and Thomas Schmidt to study the data gathered, pose questions raised by the data, and provide an analysis of the possible effects of a centralization of the two districts, as well as an analysis of the impact of remaining separate districts.

Focus groups will be convened to provide additional input and data for the study. It is recommended that there be separate focus groups in each community, with the following groups invited to attend:

- Parents
- Professional staff
- Support staff
- Students
- Athletic and band boosters
- Leaders in business and agricultural communities
- Senior citizens
- The Amish community
- Community members who do not see themselves as part of a group listed above

Data to be gathered includes the following:

- Stakeholder perspectives to be identified through focus groups that will be convened to illuminate and discuss areas of local interest. In the past, we have held group sessions for parents, teachers, support staff, students, community members, athletic boosters, senior citizens, business and agricultural leaders.



For the purpose of this study, we would add a focus group for Amish community members. The process must be fluid and flexible to accommodate these groups.

- Current and projected enrollments, including projections for future enrollment, by grade level, in a reorganized district, taking into consideration all local conditions that can be assessed.
- Current student placements, by grade level and by educational status.
- Current professional, para-professional, and Civil Service staffing, contracts, and issues, including the possibility of economies of scale, as well as the hidden costs of reorganizing the districts. Final recommendations of the committee will include staffing at all levels and a cost analysis.
- Current district leadership positions and staff assigned to them, including a cost analysis and possible economies of scale.
- Business office operations and their costs as well as investigation of alternative ways of performing all duties currently assumed in these offices.
- Finance, including state aid enhancement to reorganized districts, capital debt and projected building aid and its tax rate impact, the redistribution of eligible aid monies, revenue and expenditure histories, and tax rate projections should the districts choose to reorganize, and projected taxes should the districts choose to remain separate entities. To complete this aspect of the study, the services of Roy McMaster of Capital Market Advisors will be engaged at no additional cost to the districts. His work as a financial advisor to school districts is widely known and respected.
- Student transportation systems, including status of current bus fleets, transportation contracts, fleet maintenance, staffing and contracts, policies guiding walkers, bus seat time, post-reorganization projections of private school transportation agreements, late busing, summer busing, school start times, and analysis of hidden costs for personnel or fleets following reorganization.
- Food/Cafeteria services, including any food delivery issues, contracts, and staff.
- Student achievement on NYS assessments, using trend and disaggregated data.
- Instructional offerings, noting areas of strength for replication. A cost analysis will accompany the recommendations offered.
- Current co-curricular opportunities, extra-curricular offerings, athletics and the management of these will be reported, and recommendations will be offered, with a cost analysis for future consideration should reorganization be pursued.
- Current status of buildings and grounds, and a review of the respective Capital Assets Preservation Plans, where available, and any architect's recommendations for construction, renovation and reconstruction, both present and future, and the impact of the reorganization or different use of buildings in each district.
- Status of computer instructional technology systems, including student data management, and technology coordination.
- Human resources and data management systems.
- Professional development systems, incentives and rewards.
- School governance and school district reorganization, including past voting history in the districts, the impact of reorganization on the existing boards of education and school superintendent.



- A multiple year model of the fiscal impact on both districts separately and then combined of foundation aid, debt service, and incentive aid.

Roy McMasters will gather and analyze all financial data for each school district and do financial assessments of each district as well as of a merged district, in terms of all relevant financial topics, including state aid enhancement to reorganized districts, capital debt and projected building aid and its tax rate impact, the redistribution of eligible aid monies, revenue and expenditure histories, and tax rate projections should the districts choose to reorganize, and projected taxes should the districts choose to remain separate entities.

Finally, a set of recommendations will be developed by the Feasibility Study Committee members and by the consultants for consideration by the respective school boards. (Please see page 9 for recommendations for the composition of this committee.)

Ultimately, if the Feasibility Study Committee determines that educational outcomes can be improved AND that taxpayers could realize a savings from centralization, then a reorganization of the two districts should be considered. If neither improvements nor savings would be realized, then it would be unlikely that centralization would gain community support.

### **Details of the Merger Study Process**

1. Following the commitment of the two Boards of Education to engage Learning Design Associates (LDA) in the conduct of the study, LDA will
  - Meet with the members of the Clymer Board of Education and the Panama Board of Education.
  - Begin gathering all available data pertinent to the study, including financial, such as foundation aid, debt service and taxation; the impact of incentive aid on the financial structure of each district and as a merged district for five years; disaggregated student achievement data; student and faculty attendance; course offerings and numbers of students in each class; Special Education services and costs; curriculum coordination; transportation services and merged district bussing; cafeteria; facility maintenance and five-year plans; human resource systems and processes; capital projects; technology equipment, processes used, and coordination; athletic and co-curricular offerings and management of these systems.
  - Commence meetings with the Feasibility Study Committee to analyze all data gathered to date, determine if additional data is needed, and provide reports by individual district and by combined districts.
  - Convene focus groups and gather perception data from them.
  - Work closely with Dr. David O'Rourke, District Superintendent, Erie II-Chautauqua-Cattaraugus BOCES.
  - Consult with State Education Department Advisors Christine Coughlin and Althea Johnson to insure compliance with the spirit and letter of state laws and regulations.



- Develop reports outlining all advantages of the reorganization of the two school districts, as well as all barriers or lack of advantages to such reorganization.
  - Present individual district reports and combined services reports, accompanied by data, to both districts and to BOCES, that will contain information as to current levels of effectiveness or ineffectiveness of the finalized list of functions and recommendations with cost projections and savings as to any functions under consolidation. All recommendations will be supported by data.
2. Level of local support will be gauged by straw vote if the two boards of education decide that it is advisable to proceed with the study.
  3. Both boards of education request the NYS Commissioner of Education to layout the new district and conduct a Special Meeting (which is actually a vote on the proposed centralization). The boards' request in the form of resolutions would include supporting documentation and the recommendation of the BOCES District Superintendent.
  4. The next step includes an Order of Reorganization to be issued by the Commissioner of Education.
  5. The final step is the approval of the Order by the voters in each district, separately. If both districts vote affirmatively, the districts will be reorganized and shall commence operation on the following July 1. If one or both districts vote negatively, a second vote may not be held prior to one year and one day from the first vote, but must occur within two years of the first vote. Please note that the votes from each district are weighed equally.

### **Feasibility Study Committee**

*In all of our work as facilitators and long-range planners, we have found that by having community and professional representatives thinking and working together, the possibility of consensus on the recommendations is enhanced. We therefore respectfully suggest the following:*

- that each Board of Education appoint 10 – 12 members (for a total committee of 20-24 members).
- that this number of appointees includes instructional and support staff who are members of their bargaining unit AND residents of the district they represent (Total 4).
- that the remaining members of the committee are volunteers who come from the community, and represent such various groups as parents, business people, senior citizens, and other groups to be determined by each Board.
- that other school personnel be available to the committee, such as the superintendent, principals, business officials, guidance staff, transportation



directors, cafeteria director, special educators, etc, to provide information as needed. They are to be non-voting resources to the committee.

- that members of each Board of Education be invited to attend all meetings, but not sit on the committee.
- that all meetings be open to all residents of the districts, and thus, that the meetings be held where sufficient seating is available.
- that the press be welcome to attend all meetings to observe the process.

### **Feasibility Committee Members' Roles**

1. Bring an open mind and willingness to work using information presented;
2. Work with the consultants, analyze data presented, and contribute alternate data if needed and/or available;
3. Provide information that is known locally;
4. Problem solve as a member of the whole;
5. Make recommendations for each section of the study;
6. Make recommendations to the Boards of Education relative to the Straw Vote;
7. Serve as a communicator of public information, both from and to the committee.

### **Timeline**

(Final timeline to be determined by mutual agreement between both districts and the consultants)

**December:** Submission of proposals

**January:** Selection of consultants by Boards of Education

Initial conversations with Dr. O'Rourke and SED to discuss state guidelines and procedures for this study.

Data collection commences through the provision of access to staff and data collection systems to provide the data involved.

**February-March:** Data collection continues

**April:** Feasibility Study Committee convened; Focus Groups identified and scheduled

**May – June:** Focus Groups held; Feasibility Study Committee reviews and analyzes data from all sources

**July – August:** Feasibility Study Committee meets, completes data analysis, makes recommendations; reviewers complete final report

**\*September:** Final Report presented to the joint boards of education in public session

### **NOTES:**

1. Prior to the straw vote, should there be one, the public is informed and provided the opportunity to discuss the report.
2. \*We **strongly** recommend that the straw vote not be taken before the summer recess and then the second vote to follow in the fall. There is too much time between the two votes when the public is usually not engaged in school matters, and personnel may be unavailable to guide discussions and quell rumors. If a merger study leads to a straw vote that is positive, each board of education and staff members must be prepared to lead the communities to a successful second vote.



## **General Agreement**

### **Learning Design Associates, Inc. will**

- Conduct joint meeting with Boards of Education as requested.
- Conduct an opening meeting with Feasibility Study Committee for the purpose of orienting the committee members to the work to be done, building trust, and creating a communications network.
- Conduct up to 6 (six) formal work sessions with Feasibility Study Committee for the purpose of analyzing data, sharing information, and determining next steps.
- Conduct up to 9 (nine) focus group sessions IN EACH DISTRICT with stakeholder groups determined by the Feasibility Committee. The purpose is to gather and share local information that cannot be obtained in any other way.
- Conduct a final work session (if needed) with the Feasibility Study Committee to complete its work.
- Work on-site and remotely to collect data, prepare for meetings, develop recommendations consistent with study agreement.
- Be available for 2 (two) additional meetings and/or information sessions as needed.
- Maintain regular contact with the Superintendent.
- Advise and assist with media and public information.
- Communicate progress and status of the process with BOCES District Superintendent and SED.
- Produce and communicate (written and oral) to joint boards of education with the Feasibility Study Committee.
- Contract for and coordinate financial study.
- Be responsible for all out-of-pocket expenses for travel, lodging, meals, etc.

### **Districts will**

- Select Feasibility Study Committee members, and provide notices of meetings to members.
- Make available district personnel as needed to complete the study.
- Make available in a timely fashion all non-confidential district data and records needed to complete the study.
- Provide copying of all notices of meetings, agendas, and minutes.
- Provide postage and shipping as needed.
- Provide adequate meeting space for committee and focus group sessions.
- Provide printing and distribution of bound final report (usually via BOCES).

Note: If additional services are requested by both Clymer and Panama Central School Districts, such services will be set forth in an addendum to the contract and performed at the same rates included in the dollar cost bid.



## **References**

### ***For David***

Scott Jones, Gordon Jones and Associates (school architects); 716-633-9000

Kathy Tampo, former Town Supervisor, Town of Hanover, and current Secretary to the Chautauqua County Legislature; 716-934-2273

Rex Butcher, Past President, Pine Valley Central School District Board of Education, 716-988-3459

### ***For Marilyn***

David O'Rourke, District Superintendent, Erie 2-Chautauqua BOCES; 716-572-3543

Maryellen Royce, retired Principal (Buffalo City Schools) and immediate past Interim Special Education Director, Frewsburg Central Schools, 716-638-4137

Diane Chodan, retired, The Observer, reporter for the Brocton-Fredonia merger study, 716-203-7966

### ***For Both***

John Hertlein, retired Superintendent Brocton Central School District; 716-680-1630

David Davison, Superintendent, Westfield Central School District; 716-581-1190

Peter Holt, Feasibility Study Committee Member, Brocton-Westfield Merger Study, 716-753-7880

Gary Planty, Feasibility Study Committee Member, Brocton-Westfield Merger Study, 716-792-6649

Mike Ricketts, Member of the Board of Directors, Chautauqua Area Habitat for Humanity; 716-357-5937

Colleen Taggerty, Superintendent, Olean City School District, 716-375-8018

### ***For Tom***

Kaine Kelly, Superintendent, Randolph Central School District, 716-358-6161

Tory Irgang, Executive Director, United Way of Southern Chautauqua County, 716-483-1561, ext. 206

Susan Moran Murphy, Executive Director of the Robert H. Jackson Center, 716-483-6646

Rev. Ted Anderson, Mission of Peace Coordinator, 585-223-9560