

VI.C.

CONNECTICUT STATE BOARD OF EDUCATION Hartford

TO BE PROPOSED:

April 6, 2015

RESOLVED, That the State Board of Education, in support of the report to be submitted by the Norfolk-Colebrook temporary regional school study committee, endorses the development of a legislative proposal providing for a 10-year exemption from the provisions of C.G.S. Section 10-51(b), relating to proportional allocation of expenses, and C.G.S. Section 10-262i, the Minimum Budget Requirement, as applied to Norfolk and Colebrook, for the period beginning in the first school year in which the consolidation is in effect, provided that this Board may suspend the exemption from Section 10-262i after five years have passed if it concludes that the exemption from Section 10-262i endangers the interest of the state in the quality of education provided by the district, and directs the Commissioner to take the necessary action.

Approved as amended by a vote of 6:0, this sixth day of April, Two Thousand Fifteen.

Signed: _____
Dr. Dianna R. Wentzell, Secretary

CONNECTICUT STATE BOARD OF EDUCATION
Hartford

MEMORANDUM

TO: State Board of Education

FROM: Dr. Dianna R. Wentzell, Commissioner of Education

DATE: April 6, 2015

RE: Norfolk-Colebrook Temporary Regional School Study Committee

Executive Summary

Background

Section 10-39 of the Connecticut General Statutes (C.G.S.) authorizes two or more school districts to join in the establishment of a temporary regional school study committee to study the advisability of establishing a regional school district. The school districts of Norfolk and Colebrook formed such a committee, and the Committee held its first meeting in March 2013. The Committee's charge is to study the advisability of regionalization and prepare and submit a written report of its findings and recommendations to the respective towns and the State Board of Education (SBE). If the findings of the Committee support the feasibility and desirability of establishing a regional school district, the Committee's report must contain certain elements enumerated in statute. C.G.S. § 10-43(a).

If the Committee finds the establishment of a proposed regional district to be advisable, the Committee shall submit its final report to the SBE and the town clerk of each participating town, which has 30 days in which to accept or reject the recommendations of the Committee. If the SBE accepts the recommendations of the Committee, the SBE must certify to the town clerk in each of the participating towns that the Committee recommendations have been approved. Thereafter, in accordance with C.G.S. § 10-43(b), the Committee must hold a public meeting in each town to present the certified report. Referenda in each participating town must subsequently be held on the advisability of establishing a new regional district. Upon an affirmative vote to regionalize in each of the towns, a new regional school district is formed, and the Committee's report becomes the operating document or "plan" of the regional school district. See C.G.S. Sec. 10-43 et seq. and Reg. School Dist. No. 12 v. Town of Bridgewater, 292 Conn. 119 (2009).

As noted, the Committee has been meeting periodically since March 2013. The Committee has made steady progress toward completing its report, and anticipates the completion of its final report within the next several months. In the course of this process, the Committee has determined that certain specific provisions of the C.G.S. must be amended in order for the Committee's proposed plan to be legally permissible. In particular, there is concern that the current version of the proposed plan would violate the C.G.S. Section 10-262i – the Minimum Budget Requirement (MBR) – and Section 10-51(b), which requires that, within a regional school district, each town's net expenses to be paid to the regional district must be proportional to each town's student population.¹

In an effort to address these issues, the Committee, working with the SDE, initially drafted a legislative proposal that would allow the SBE to waive, for a five-year period, the requirements of Sections 10-262i and 10-51(b). In recent months, based in part on revised budget forecasts generated by the Committee, the Committee has determined that a 10-year exemption from these requirements is required in order for its regionalization plan to be viable. The Committee is seeking the SBE's endorsement of a 10-year exemption from these statutory provisions. A draft version of the Committee's plan is included for your reference. Please be advised, however, that the Committee is not submitting its plan formally at this time, and that the Committee's final plan may differ from the enclosed draft version. Representatives of the Committee will be present at the April 6, 2015, State Board of Education meeting.

Recommendation

The SDE has been, and remains, supportive of the Committee's regionalization efforts, and is willing to submit to the General Assembly on behalf of the Committee a legislative proposal that would provide for a 5-year exemption from these requirements. The Department is concerned, however, that granting the full 10-year exemption sought by the Committee would exempt the

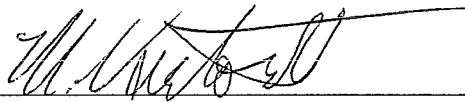
¹ The full text of C.G.S. § 10-51(b) is as follows:

"[N]et expenses" means estimated expenditures, including estimated capital expenditures, less estimated receipts as presented in a regional school district budget. On the date or dates fixed by the board, each town in the district shall pay a share of the cost of capital outlay, including costs for school building projects under chapter 173, and current expenditures necessary for the operation of the district. The board shall determine the amount to be paid by each member town. Such amount shall bear the same ratio to the net expenses of the district as the number of pupils resident in such town in average daily membership in the regional school district during the preceding school year bears to the total number of such pupils in all the member towns, provided that the board may recalculate such amount based on the number of pupils in average daily membership in the regional school district for the current school year and may adjust each member town's payment to the regional school district for the following fiscal year by the difference between the last such payment and the recalculated amount. Until the regional school district has been in operation for one year, such amounts shall be based on the average daily membership of pupils in like grades from each of such towns at any school at which children were in attendance at the expense of such towns during the preceding school year.

towns from these important statutory requirements for too long a period of time. The purpose of these statutory provisions is to preserve and ensure the educational quality and financial viability of districts. The Committee's proposed rationale for the 10-year exemption relates to the issue of declining student enrollment, a concern with which numerous school districts across the state are grappling. The current MBR statute provides for adjustments due to declining enrollment. To the extent that the current statute may need to be modified to reflect declining enrollment statewide, it seems likely that the General Assembly will address this issue in a systematic fashion through the legislative process.

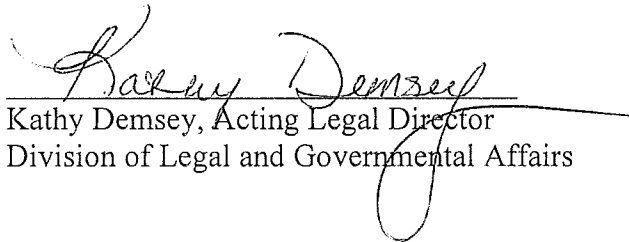
The SDE recommends that the SBE approve a definitive 5-year exemption from the provisions at issue, with an option for the newly established regional board of education to request an exemption for an additional period of time. A new regional board could make such a proposal to the SBE once it has been in operation for three years. Upon receipt of this request, the SBE would have the authority to grant this exemption provided the new regional board establishes that the extended exemption is required in order to preserve the financial viability of the new district.

Prepared by:



Matthew Venhorst, Staff Attorney
Division of Legal and Governmental Affairs

Reviewed by:



Kathy Demsey, Acting Legal Director
Division of Legal and Governmental Affairs

Norfolk Colebrook School Study Committee Exemption Proposal Summary

1. Objectives of meeting:

- Explain the rationale for 10 years.
- Understand potential issues with 10 years versus five.
- Agree on next steps.

2. Combining the two schools will save 8.1% in the first year, and 14.1% in the tenth year, versus the cost of continuing independently “as is.” The initial savings result from consolidating two schools into one building and eliminating duplicate activities. The initial savings only require a one-time MBR exemption.

3. Savings in subsequent years are a function of enrollment and the guidelines for class size (currently 18 for K-1, 22 for 2-3, 24 for 4-6). The projected enrollment will permit three grades to be consolidated into single sections beginning in 2018-19. Some of these savings may be lost if the MBR exemption is only five years.

<u>K-6 Enrollment</u>	<u>2014-15</u>	<u>2016-17</u>	<u>2020-21</u>	<u>2025-26</u>
Total	193	182	162	162
% Norfolk	52.8%	52.2%	49.4%	51.9%
% Colebrook	47.2%	47.8%	50.6%	48.1%

4. If guidelines for class size are increased by two children – or if enrollment declines by more than expected – up to five grades can be consolidated. These savings may also be lost if the MBR exemption is only five years.

<u>K-6 Sections</u>	<u>2014-15</u>	<u>2016-17</u>	<u>2020-21</u>	<u>2025-26</u>
Current Guidelines	14	14	11	11
Guidelines + 2	12	12	10	9

5. Even though the dollar budget is expected to decline in some years, the cost per student is projected to increase in each year from 2014-15 through 2025-26.

<u>Cost Per Student</u>	<u>2014-15</u>	<u>2016-17</u>	<u>2020-21</u>	<u>2025-26</u>
Combined “As Is”	\$22,785	\$25,168	\$30,470	\$32,671
Pro Forma	\$20,977	\$23,139	\$26,197	\$28,071

6. The enrollment-based allocation of regional budgets required by CGS 10-51(b) will give all of the savings to Norfolk during the first five years. This happens because Colebrook’s initial cost per student is 16.9% lower than Norfolk’s (i.e., twice the initial savings). The situation improves during the second five years.

<u>First 5 Years 2016-2021</u>	<u>Norfolk</u>	<u>Colebrook</u>
Average Enrollment Share	50.1%	49.9%
Total Savings vs. “As Is”	\$2,938,736	(\$497,483)
<u>Second 5 Years 2021-26</u>		
Average Enrollment Share	49.9%	50.1%
Total Savings vs. “As Is”	\$3,641,986	\$4,368

7. A more equitable distribution of savings is achieved by allocating the pro forma budget based on each town's average share of the "as is" budgets – 57.4% to Norfolk and 42.6% to Colebrook – during the first five years. A transition to CGS 10-51(b) will occur during the second five years.

<u>First five years 2016-21</u>	<u>Norfolk</u>	<u>Colebrook</u>
Fixed Allocation	57.4%	42.6%
Total Savings vs. "As Is"	\$1,506,810	\$1,099,936
<u>Second five Years 2021-26</u>		
Average Transition Share	54.1%	45.9%
Total Savings vs. "As Is"	\$2,760,656	\$858,201

8. If the transition to CGS 10-51(b) occurs immediately at the end of the fifth year, Colebrook's allocation will jump by 16.9% from \$1,807,924 in 2020-21 to \$2,112,964 in 2021-22. We believe that such a transition will be a hard sell to the voters of Colebrook. Hence our request for a ten year exemption.

Notes

1. Enrollment projections were prepared by Peter M. Prowda on 3/18/15.
2. The financial projections were prepared by the Fiscal Sub-committee based on each town's approved budget for 2014-15.
3. Both the financial projections and the allocation method are subject to final approval by the full Study Committee.

**Norfolk/Colebrook Study Committee
Financial Forecast
Introduction & Contents**

Introduction

This forecast is based on the 2014-15 budgets approved by each town. Several changes are made to the town budgets to reflect staff changes that occurred after the budgets were approved. The pro forma budget, which combines the two towns, assumes that (i) all children will attend the Botelle School; (ii) program offerings are substantially unchanged; (iii) duplicate administrative and operating expenses are eliminated; and (iv) a new expense item for town-provided services, such as mowing, is added. Next, ten year forecasts are made for each town and the pro forma combination. The forecast period runs from the expected start date of the new school in 2016-17 and ends in 2025-26. The forecast makes four types of assumptions: (i) teacher salaries assume that the 2014-15 staff remains in place and advances in seniority under the step structure of the current Norfolk contract, which is inflated by 1% a year; (ii) all other salary expense is inflated by 2% a year; (iii) benefits are a flat percentage of salaries; and (iv) most other line items are flat amounts based on six years of historical data. Separate enrollment projections for 2015-16 through 2024-25 were provided by Peter M. Prowda in 2013 and updated in 2015. Initially, there are two sections of each K-6 grade. However, declining enrollment will allow three grades to be combined into single sections during the forecast period.

Contents

Tab #	Name	Description
1.	Introduction	Explains forecast process. Describes each tab of Excel workbook.
2.	Summary	Forecast summary over 10 year period from 2015-16 through 2024-25.
3.	Allocation - "As Is" Share	Allocation of pro forma based on average share of combined "as is."
4.	Allocation - CGS 10-51(b)	Allocation of pro forma based on CGS 10-51(b).
5.	Forecast Comparisons	Compares 2014-15 forecasts to 2013-14 forecasts and preliminary study.
6.	Pro Forma Forecast	Year-by-year forecast from 2014-15 through 2024-25.
6.a.	Pro Forma Staff Forecast	Forecast of certified FTE, salary schedules, and expense.
7.	Norfolk Forecast	Year-by-year forecast from 2014-15 through 2024-25.
7.a.	Norfolk Staff Forecast	Forecast of certified FTE, salary schedules, and expense.
8.	Colebrook Forecast	Year-by-year forecast from 2014-15 through 2024-25.
8.a.	Colebrook Staff Forecast	Forecast of certified FTE, salary schedules, and expense.
9.	2014-15 Pro Forma Budget	2014-15 pro forma budget and forecast assumptions.
10.	Pro Forma Changes	Lists each change to create pro forma budget.
11.	Pro Forma Staffing	Pro forma 2014-15 FTE. Converts all certified salaries to Norfolk contract.
12.	Norfolk Staffing	Actual 2014-15 FTE, including post-budget changes to certified staff.
13.	Colebrook Staffing	Actual 2014-15 FTE, including post-budget changes to certified staff.
14.	Combined History	2104-15 budgets combined, five years actual data, and forecast assumptions.
15.	Norfolk History	2104-15 budget, five years actual data, and forecast assumptions.
16.	Colebrook History	2104-15 budget, five years actual data, and forecast assumptions.
17.	Projected Enrollment	Enrollment projections for 2015-16 through 2024-25 by Peter M. Prowda.
18.	Account Map	Maps Colebrook chart of accounts onto Norfolk chart of accounts.
19.	Reconciliation	Tracks changes from original 2014-15 budgets to pro forma.

**Norfolk/Colebrook Study Committee
Summary of Forecast Savings**

	1st Year 2016-17	Last Year 2025-26	1st 5 Years 2016-21	2nd 5 Years 2021-26	10 Years 2016-26
1. Town Budgets "As Is"					
Norfolk "As Is"	2,637,523	3,023,851			
Colebrook "As Is"	1,943,083	2,268,887			
Combined "As Is" Budget	4,580,606	5,292,738			
2. Pro Forma Budget					
	4,211,254	4,547,532			
3. Pro Forma vs "As Is"					
Dollar Savings	369,352	745,207	2,606,746	3,618,857	6,225,604
Percentage Savings	8.1%	14.1%	10.9%	14.0%	12.5%
4. Budget Allocation					
Norfolk Share Pro Forma	57.4%	51.9%	57.4%	54.1%	55.7%
Colebrook Share Pro Forma	42.6%	48.1%	42.6%	45.9%	44.3%
	100.0%	100.0%	100.0%	100.0%	100.0%
Norfolk	2,417,260	2,357,979			
Colebrook	1,793,994	2,189,552			
Total Pro Forma	4,211,254	4,547,532			
Norfolk Savings vs "As Is"	220,263	665,872	1,506,810	2,760,656	4,267,466
Colebrook Savings vs "As Is"	149,089	79,335	1,099,936	858,201	1,958,137
Total Savings vs "As Is"	369,352	745,207	2,606,746	3,618,857	6,225,604
Norfolk Savings % "As Is"	8.4%	22.0%	11.0%	20.7%	14.8%
Colebrook Savings % "As Is"	7.7%	3.5%	10.8%	7.8%	9.3%
5. Enrollment (Excludes Pre-K)					
Norfolk	95	84			
Colebrook	87	78			
Total	182	162			
Norfolk % Total	52.2%	51.9%			
Colebrook % Total	47.8%	48.1%			
Total	100.0%	100.0%			

Notes:

1. The pro forma forecast includes the cost of town-provided services, but not new programs or pre-existing debt service.
2. The first 5 years of the pro forma budget are allocated according to each town's average share of the combined "as is" budget. Those shares are Norfolk 57.4% and Colebrook 42.6%.
3. During the second 5 years of the pro forma budget, each town's share of the budget is adjusted annually until it equals share of total enrollment in 2025-26.
4. Enrollment projections through 2024-25 were provided by Peter M. Prowda. The enrollment in 2025-26 is assumed to be the same as 2024-25.

Norfolk/Colebrook Study Committee
Allocation Per Share Of "As Is"

	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
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1. Allocation Methodology

During years 1-5, the pro forma forecast is allocated on the basis of each town's average share in the combined "as is" forecast, 57.4% for Norfolk and 42.6% for Colebrook. During years 6-10 these shares are adjusted annually so that in year 10 they equal the enrollment-based share, which is currently projected to be 51.9% for Norfolk and 48.1% for Colebrook.

2. Town "As Is" Forecasts

Norfolk "As Is"	2,637,523	2,689,084	2,747,052	2,786,403	2,826,744	2,868,103	2,912,732	2,952,153	2,987,686	3,023,851
Colebrook "As Is"	1,943,083	1,986,756	2,029,360	2,070,860	2,109,386	2,146,629	2,179,024	2,208,600	2,238,653	2,268,887
Combined "As Is" Forecast	4,580,606	4,675,840	4,776,412	4,857,263	4,936,130	5,014,732	5,091,756	5,160,753	5,226,339	5,292,738
Norfolk % Combined "As Is"	57.6%	57.5%	57.5%	57.4%	57.3%	57.2%	57.2%	57.2%	57.2%	57.1%
Colebrook % Combined "As Is"	42.4%	42.5%	42.5%	42.6%	42.7%	42.8%	42.8%	42.8%	42.8%	42.9%
Combined "As Is" Forecast	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

3. Pro Forma Forecast

	4,211,254	4,303,839	4,285,009	4,175,452	4,243,952	4,308,252	4,377,737	4,440,441	4,493,499	4,547,532
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4. Pro Forma vs "As Is"

Dollar Savings	369,352	372,001	491,403	681,812	692,178	706,480	714,019	720,312	732,840	745,207
Percentage Savings	8.1%	8.0%	10.3%	14.0%	14.0%	14.1%	14.0%	14.0%	14.0%	14.1%

5. Allocation By "As Is" Share

Norfolk Average Share	57.4%	57.4%	57.4%	57.4%	57.4%	56.3%	55.2%	54.1%	53.0%	51.9%
Colebrook Average Share	42.6%	42.6%	42.6%	42.6%	42.6%	43.7%	44.8%	45.9%	47.0%	48.1%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Norfolk Share Pro Forma	2,417,260	2,470,403	2,459,595	2,396,709	2,436,029	2,425,546	2,416,511	2,402,279	2,381,555	2,357,979
Colebrook Share Pro Forma	1,793,994	1,833,435	1,825,414	1,778,742	1,807,924	1,882,706	1,961,226	2,038,162	2,111,945	2,189,552
Total Pro Forma	4,211,254	4,303,839	4,285,009	4,175,452	4,243,952	4,308,252	4,377,737	4,440,441	4,493,499	4,547,532

Norfolk Savings vs "As Is"	220,263	218,681	287,457	389,694	390,715	442,557	496,221	549,874	606,131	665,872
Colebrook Savings vs "As Is"	149,089	153,321	203,946	292,118	301,462	263,923	217,798	170,438	126,708	79,335
Total Savings vs "As Is"	369,352	372,001	491,403	681,812	692,178	706,480	714,019	720,312	732,840	745,207

Norfolk % Savings	59.6%	58.8%	58.5%	57.2%	56.4%	62.6%	69.5%	76.3%	82.7%	89.4%
Colebrook % Savings	40.4%	41.2%	41.5%	42.8%	43.6%	37.4%	30.5%	23.7%	17.3%	10.6%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Norfolk/Colebrook Study Committee
Allocation Per CGS 100-51(b)

2016-17 2017-18 2018-19 2019-20 2020-21 2021-22 2022-23 2023-24 2024-25 2025-26

1. Allocation Methodology

The pro forma forecast is allocated to each town as required by section 10-51(b) of the Connecticut General Statutes: that is in an amount equal to each town's share of total enrollment.

2. Enrollment Forecast

Norfolk	95	96	91	82	80	80	80	82	84	84
Colebrook	87	86	84	79	82	77	76	79	78	78
Total	182	182	175	161	162	157	156	161	162	162
Norfolk % Enrollment	52.2%	52.7%	52.0%	50.9%	49.4%	51.0%	51.3%	50.9%	51.9%	51.9%
Colebrook % Enrollment	47.8%	47.3%	48.0%	49.1%	50.6%	49.0%	48.7%	49.1%	48.1%	48.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

3. Town "As Is" Forecasts

Norfolk "As Is"	2,637,523	2,689,084	2,747,052	2,786,403	2,826,744	2,868,103	2,912,732	2,952,153	2,987,686	3,023,851
Colebrook "As Is"	1,943,083	1,986,756	2,029,360	2,070,860	2,109,386	2,146,629	2,179,024	2,208,600	2,238,653	2,268,887
Combined "As Is" Forecast	4,580,606	4,675,840	4,776,412	4,857,263	4,936,130	5,014,732	5,091,756	5,160,753	5,226,339	5,292,738

4. Pro Forma Forecast

Pro Forma Forecast	4,211,254	4,303,839	4,285,009	4,175,452	4,243,952	4,308,252	4,377,737	4,440,441	4,493,499	4,547,532
Savings vs. Combined "As Is"	369,352	372,001	491,403	681,812	692,178	706,480	714,019	720,312	732,840	745,207
Savings % Combined "As Is"	8.1%	8.0%	10.3%	14.0%	14.0%	14.1%	14.0%	14.0%	14.0%	14.1%

5. Allocation By Enrollment

Norfolk % Enrollment	52.2%	52.7%	52.0%	50.9%	49.4%	51.0%	51.3%	50.9%	51.9%	51.9%
Colebrook % Enrollment	47.8%	47.3%	48.0%	49.1%	50.6%	49.0%	48.7%	49.1%	48.1%	48.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Norfolk Share Pro Forma	2,198,182	2,270,157	2,228,205	2,126,627	2,095,779	2,195,288	2,244,993	2,261,591	2,329,963	2,357,979
Colebrook Share Pro Forma	2,013,072	2,033,682	2,056,804	2,048,824	2,148,173	2,112,964	2,132,744	2,178,850	2,163,537	2,189,552
Total Pro Forma	4,211,254	4,303,839	4,285,009	4,175,452	4,243,952	4,308,252	4,377,737	4,440,441	4,493,499	4,547,532
Norfolk Savings vs "As Is"	439,341	418,927	518,847	659,776	730,965	672,815	667,739	690,562	657,723	665,872
Colebrook Savings vs "As Is"	(69,989)	(46,926)	(27,444)	22,036	(38,787)	33,665	46,280	29,750	75,116	79,335
Total Savings vs "As Is"	369,352	372,001	491,403	681,812	692,178	706,480	714,019	720,312	732,840	745,207
Norfolk % Savings	118.9%	112.6%	105.6%	96.8%	105.6%	95.2%	93.5%	95.9%	89.7%	89.4%
Colebrook % Savings	-18.9%	-12.6%	-5.6%	3.2%	-5.6%	4.8%	6.5%	4.1%	10.3%	10.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

**Norfolk/Colebrook Study Committee
Comparative Growth Rates**

	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
Norfolk/Colebrook Pro Forma												
2013-14 Pro Forma Expense Growth	3,970,733 2.4%	4,051,112 2.0%	4,141,631 2.2%	4,129,164 -0.3%	4,200,164 1.7%	4,057,275 -3.4%	4,129,751 1.8%	4,196,318 1.6%	4,261,634 1.6%	4,320,190 1.4%	4,382,402 1.4%	
2014-15 Pro Forma Expense Growth	4,048,575	4,124,033 1.9%	4,211,254 2.1%	4,303,839 2.2%	4,285,009 -0.4%	4,175,452 -2.6%	4,243,952 1.6%	4,308,252 1.5%	4,377,737 1.6%	4,440,441 1.4%	4,493,499 1.2%	4,547,532 1.2%
Norfolk Forecast												
2013-14 "As Is" Expense Growth	2,498,979 2.1%	2,543,893 1.8%	2,596,859 2.1%	2,652,163 2.1%	2,691,203 1.5%	2,731,253 1.5%	2,772,887 1.5%	2,815,739 1.5%	2,855,018 1.4%	2,892,351 1.3%	2,931,209 1.3%	
2014-15 "As Is" Expense Growth	2,538,243	2,587,266 1.9%	2,637,523 1.9%	2,689,084 2.0%	2,747,052 2.2%	2,786,403 1.4%	2,826,744 1.4%	2,868,103 1.5%	2,912,732 1.6%	2,952,153 1.4%	2,987,686 1.2%	3,023,851 1.2%
Colebrook Forecast												
2013-14 "As Is" Expense Growth	1,801,535 1.7%	1,845,758 2.5%	1,890,774 2.4%	1,932,878 2.2%	1,971,936 2.0%	2,011,668 2.0%	2,048,257 1.8%	2,085,486 1.8%	2,123,256 1.8%	2,161,730 1.8%	2,201,069 1.8%	
2014-15 "As Is" Expense Growth	1,859,166	1,901,720 2.3%	1,943,083 2.2%	1,986,756 2.2%	2,029,360 2.1%	2,070,860 2.0%	2,109,386 1.9%	2,146,629 1.8%	2,179,024 1.5%	2,208,600 1.4%	2,238,653 1.4%	2,268,887 1.4%
Preliminary Study												
Pro Forma Expense Growth	3,911,901 -0.2%	3,990,139 2.0%	3,982,251 -0.2%	4,061,896 2.0%	3,960,668 -2.5%	4,039,881 2.0%	4,310,517 6.7%	4,299,910 -0.2%	4,299,910 0.0%			
Norfolk Expense Growth	2,601,000 2.0%	2,653,020 2.0%	2,706,080 2.0%	2,760,202 2.0%	2,815,406 2.0%	2,871,714 2.0%	2,929,148 2.0%	2,987,731 2.0%	2,987,731 0.0%			
Colebrook Expense Growth	1,854,869 2.0%	1,891,966 2.0%	1,929,806 2.0%	1,968,402 2.0%	2,007,770 2.0%	2,047,925 2.0%	2,088,884 2.0%	2,130,661 2.0%	2,130,661 0.0%			
2013 Enrollment Forecast												
Norfolk	101	100	93	92	88	83	82	80	79	81		
Colebrook	98	97	93	93	88	83	82	81	79	81		
Combined	199	197	186	185	176	166	164	161	158	162		
Enrollment Growth	-1.5%	-1.0%	-5.6%	-0.5%	-4.9%	-5.7%	-1.2%	-1.8%	-1.9%	2.5%		
2015 Enrollment Forecast												
Norfolk	102	102	95	96	91	82	80	80	80	82	84	
Colebrook	91	91	87	86	84	79	82	77	76	79	78	
Combined	193	193	182	182	175	161	162	157	156	161	162	
Enrollment Growth	-2.0%	0.0%	-5.7%	0.0%	-3.8%	-8.0%	0.6%	-3.1%	-0.6%	3.2%	0.6%	

**Norfolk/Colebrook Study Committee
Pro Forma Forecast**

Description	Pro Forma	Forecast Assumptions	Forecast					
	2014-15		2016-17	2017-18	2018-19	2023-24	2024-25	2025-26
1000 Regular Education								
Teachers	1,379,855	Norfolk teachers' contract: steps + 1% GWI annually.	1,462,573	1,510,278	1,463,680	1,450,156	1,467,658	1,485,498
Educational Assistants	218,955	Inflation rate: 2% per annum.	227,801	232,357	237,004	261,672	266,905	272,243
Substitutes	24,300	Inflation rate: 2% per annum.	25,282	25,788	26,304	29,041	29,622	30,214
Field Trips, Cultural & Environmental	11,000	Flat @ average of \$10,500.	10,500	10,500	10,500	10,500	10,500	10,500
Textbooks, Supplies & Curriculum	38,036	Flat @ average of \$39,000.	39,000	39,000	39,000	39,000	39,000	39,000
Instructional Equipment & Repairs	1,780	Flat @ average of \$2,200.	2,200	2,200	2,200	2,200	2,200	2,200
Tests, Scoring & Dues	4,692	Flat @ average of \$4,800.	4,800	4,800	4,800	4,800	4,800	4,800
Subtotal	1,678,618		1,772,156	1,824,923	1,783,488	1,797,369	1,820,685	1,844,455
1200 Special Education								
Special Education Teachers	142,351	Norfolk teachers' contract: steps + 1% GWI annually.	150,458	157,321	166,468	192,818	194,746	196,694
Aides, Substitutes & Therapists	55,157	Inflation rate: 2% per annum.	57,385	58,533	59,704	65,918	67,236	68,581
Special Education Tuition	162,399	Flat @ average of \$145,000.	145,000	145,000	145,000	145,000	145,000	145,000
Shared Services	195,526	Flat @ 85% of average: \$195,000	195,000	195,000	195,000	195,000	195,000	195,000
Special Ed - Support Services	39,500	Flat @ average of \$43,000.	43,000	43,000	43,000	43,000	43,000	43,000
Testing & Supplies	2,500	Flat @ average of \$1,000.	1,000	1,000	1,000	1,000	1,000	1,000
Subtotal	597,433		591,843	599,854	610,172	642,736	645,982	649,275
2100 Health Supportive Services								
School Nurse	38,825	Inflation rate: 2% per annum.	40,394	41,202	42,026	46,400	47,328	48,275
Other Health Support	5,215	Flat @ average of \$4,800.	4,800	4,800	4,800	4,800	4,800	4,800
Subtotal	44,040		45,194	46,002	46,826	51,200	52,128	53,075
2220 Media & Computer Services								
Media Specialist	88,386	Norfolk teachers' contract: steps + 1% GWI annually.	91,515	92,888	93,817	98,603	99,589	100,585
Computer/Technology Support	11,380	Flat @ average of \$11,900.	11,900	11,900	11,900	11,900	11,900	11,900
Library Books, Periodicals & Software	10,955	Flat @ 80% of average: \$11,200	11,200	11,200	11,200	11,200	11,200	11,200
Equipment & Repairs	10,000	Flat @ average of \$11,000	11,000	11,000	11,000	11,000	11,000	11,000
Dues & Fees - Library	850	Flat @ average of \$850	850	850	850	850	850	850
Subtotal	121,571		126,465	127,838	128,767	133,553	134,539	135,535
2310 Board of Education								
Board of Education	35,255	Flat @ average of \$35,000.	35,000	35,000	35,000	35,000	35,000	35,000
2320 Superintendent's Office								
Superintendent	56,000	Inflation rate: 2% per annum.	58,262	59,427	60,616	66,925	68,264	69,629
Fiscal & Payroll Staff	100,583	Inflation rate: 2% per annum.	104,647	106,740	108,875	120,207	122,611	125,063
Other Superintendent	19,638	Flat @ average of \$19,000.	19,000	19,000	19,000	19,000	19,000	19,000
Subtotal	176,221		181,909	185,167	188,491	206,132	209,875	213,692

Description	Pro Forma	Forecast Assumptions	Forecast					
	2014-15		2016-17	2017-18	2018-19	2023-24	2024-25	2025-26
2400 Support Services - Administration								
Principal	100,000	Inflation rate: 2% per annum.	104,040	106,121	108,243	119,508	121,898	124,336
Secretary & Head Teacher	49,142	Inflation rate: 2% per annum.	51,128	52,151	53,194	58,731	59,906	61,104
Other Administrative Support	18,205	Flat @ average of \$14,000.	14,000	14,000	14,000	14,000	14,000	14,000
Subtotal	167,347		169,168	172,272	175,437	192,239	195,804	199,440
2600 Operations & Maintenance								
Custodial Staff	128,600	Inflation rate: 2% per annum.	133,794	136,470	139,199	153,686	156,760	159,895
Overtime & Summer Help	6,825	Flat @ \$9,200 per annum.	9,200	9,200	9,200	9,200	9,200	9,200
Service Contracts & Supplies	44,604	Inflation rate: 2% per annum.	46,406	47,334	48,281	53,307	54,373	55,460
Water	2,895	Flat @ Norfolk average of \$3,000 per annum.	3,000	3,000	3,000	3,000	3,000	3,000
Electricity	31,000	Inflate Norfolk 2013-14 @1% p.a.	31,623	31,939	32,258	33,904	34,243	34,585
Heating Oil	58,950	Inflate Norfolk 2013-14 @1% p.a.	60,135	60,736	61,343	64,472	65,117	65,768
Building Repairs & Improvements	13,850	Flat @ Norfolk average of \$40,000 per annum.	40,000	40,000	40,000	40,000	40,000	40,000
Equipment & Repairs	1,700	Flat @ Norfolk average of \$15,200 per annum.	15,200	15,200	15,200	15,200	15,200	15,200
Subtotal	288,424		339,358	343,879	348,481	372,769	377,893	383,108
2700 Student Transportation								
Regular Transportation	222,000	7 busses @ \$31,000 each: inflate 1% per annum.	226,462	228,727	231,014	242,798	245,226	247,678
Special Ed Transportation	78,001	Flat @ average of \$50,000 per annum.	50,000	50,000	50,000	50,000	50,000	50,000
Subtotal	300,001		276,462	278,727	281,014	292,798	295,226	297,678
2800 Employer Provided Benefits								
Medicare & Social Security	88,768	3.5% of certified + non-certified salaries.	87,755	90,275	89,570	93,228	94,588	95,974
Life & Disability Insurance	5,956	Flat @ \$5,700 per annum.	5,700	5,700	5,700	5,700	5,700	5,700
Health & Dental Insurance	464,671	17.5% of certified + non-certified salaries.	438,774	451,373	447,848	466,141	472,942	479,870
Non-Certified Retirement Plan	80,668	5.0% of non-certified salaries.	32,022	32,662	33,315	36,783	37,518	38,269
Unemployment, TRB & ERIP	15,448	Flat @ \$18,000 per annum.	18,000	18,000	18,000	18,000	18,000	18,000
Subtotal	655,511		582,251	598,010	594,433	619,852	628,748	637,813
All Other	8,625	Flat @ \$9,000 per annum.	9,000	9,000	9,000	9,000	9,000	9,000
Town Provided Services								
Insurance	46,402	Flat @ pro forma amount: \$46,500.	46,500	46,500	46,500	46,500	46,500	46,500
Other Town Provided	34,552	Inflation rate: 2% per annum.	35,948	36,667	37,400	41,293	42,119	42,961
Subtotal	80,954		82,448	83,167	83,900	87,793	88,619	89,461
Total School Budget	4,153,999		4,211,254	4,303,839	4,285,009	4,440,441	4,493,499	4,547,532

**Norfolk/Colebrook Study Committee
Norfolk Forecast**

Description	Budget	Forecast Assumptions	Forecast					
	2014-15		2016-17	2017-18	2018-19	2023-24	2024-25	2025-26
1000 Regular Education								
Teachers	742,876	Norfolk teachers' contract: steps + 1% GWI annually.	787,217	810,127	836,421	916,987	927,595	938,387
Educational Assistants	98,072	Inflation rate: 2% per annum.	102,034	104,075	106,157	117,206	119,550	121,941
Substitutes	11,300	Inflation rate: 2% per annum.	11,757	11,992	12,232	13,507	13,777	14,053
Field Trips, Cultural & Environmental	9,275	Flat @ average of \$9,000.	9,000	9,000	9,000	9,000	9,000	9,000
Textbooks, Supplies & Curriculum	20,500	Flat @ average of \$21,500.	21,500	21,500	21,500	21,500	21,500	21,500
Instructional Equipment & Repairs	1,780	Flat @ average of \$2,200.	2,200	2,200	2,200	2,200	2,200	2,200
Tests, Scoring & Dues	1,392	Flat @ average of \$1,200.	1,200	1,200	1,200	1,200	1,200	1,200
Subtotal	885,195		934,908	960,094	988,710	1,081,600	1,094,822	1,108,281
1200 Special Education								
Special Education Teachers	73,859	Norfolk teachers' contract: steps + 1% GWI annually.	80,254	84,001	89,643	94,215	95,157	96,109
Aides, Substitutes & Therapists	33,032	Inflation rate: 2% per annum.	34,367	35,054	35,755	39,476	40,266	41,071
Special Education Tuition	50,089	Flat @ average of \$51,000.	51,000	51,000	51,000	51,000	51,000	51,000
Shared Services	130,355	Flat @ 85% of average: \$132,000.	132,000	132,000	132,000	132,000	132,000	132,000
Special Ed - Support Services	39,500	Flat @ average of \$44,000.	44,000	44,000	44,000	44,000	44,000	44,000
Testing & Supplies	2,500	Flat @ average of \$1,500.	1,500	1,500	1,500	1,500	1,500	1,500
Subtotal	329,335		343,121	347,555	353,898	362,191	363,923	365,680
2100 Health Supportive Services								
School Nurse	38,825	Inflation rate: 2% per annum.	40,394	41,202	42,026	46,400	47,328	48,275
Other Health Support	3,500	Flat @ average of \$3,100.	3,100	3,100	3,100	3,100	3,100	3,100
Subtotal	42,325		43,494	44,302	45,126	49,500	50,428	51,375
2220 Media & Computer Services								
Media Specialist	53,032	Norfolk teachers' contract: steps + 1% GWI annually.	54,909	55,733	56,290	59,162	59,753	60,351
Computer/Technology Support	11,380	Flat @ average of 11,000.	11,000	11,000	11,000	11,000	11,000	11,000
Library Books, Periodicals & Software	3,964	Flat @ average of \$6,100.	6,100	6,100	6,100	6,100	6,100	6,100
Equipment & Repairs	10,000	Flat @ average of \$10,000.	10,000	10,000	10,000	10,000	10,000	10,000
Dues & Fees - Library	850	Flat @ average of \$830.	830	830	830	830	830	830
Subtotal	79,226		82,839	83,663	84,220	87,092	87,683	88,281
2310 Board of Education								
	27,805	Flat @ average of \$28,000.	28,000	28,000	28,000	28,000	28,000	28,000
2320 Superintendent's Office								
Superintendent	56,000	Inflation rate: 2% per annum.	58,262	59,427	60,616	66,925	68,264	69,629
Fiscal & Payroll Staff	89,463	Inflation rate: 2% per annum.	93,077	94,939	96,838	106,917	109,055	111,236
Other Superintendent	14,588	Flat @ average of \$14,000.	14,000	14,000	14,000	14,000	14,000	14,000
Subtotal	160,051		165,339	168,366	171,454	187,842	191,319	194,865

Description	Budget	Forecast Assumptions	Forecast					
	2014-15		2016-17	2017-18	2018-19	2023-24	2024-25	2025-26
2400 Support Services - Administration								
Principal	100,000	Inflation rate: 2% per annum.	104,040	106,121	108,243	119,508	121,898	124,336
Secretary & Head Teacher	47,142	Inflation rate: 2% per annum.	49,047	50,028	51,029	56,341	57,468	58,617
Other Administrative Support	11,905	Flat @ average of \$11,000.	11,000	11,000	11,000	11,000	11,000	11,000
Subtotal	159,047		164,087	167,149	170,272	186,849	190,366	193,953
2600 Operations & Maintenance								
Custodial Staff	103,591	Inflation rate: 2% per annum.	107,776	109,932	112,131	123,801	126,277	128,803
Overtime & Summer Help	6,075	Flat @ average of \$8,100.	8,100	8,100	8,100	8,100	8,100	8,100
Service Contracts & Supplies	44,604	Inflation rate: 2% per annum.	46,406	47,334	48,281	53,307	54,373	55,460
Water	2,895	Flat @ average of \$2,850.	2,850	2,850	2,850	2,850	2,850	2,850
Electricity	31,000	Inflation rate: 1% per annum.	31,623	31,939	32,258	33,904	34,243	34,585
Heating Oil	58,950	Inflation rate: 1% per annum.	60,135	60,736	61,343	64,472	65,117	65,768
Building Repairs & Improvements	13,850	Flat @ average of \$38,000.	38,000	38,000	38,000	38,000	38,000	38,000
Equipment & Repairs	1,700	Flat @ average of \$14,700.	14,700	14,700	14,700	14,700	14,700	14,700
Subtotal	262,665		309,590	313,591	317,663	339,134	343,660	348,266
2700 Student Transportation								
Regular Transportation	151,672	Inflation rate: 1% per annum.	154,721	156,268	157,831	165,881	167,540	169,215
Special Ed Transportation	53,640	Flat @ average of \$45,000.	45,000	45,000	45,000	45,000	45,000	45,000
Subtotal	205,312		199,721	201,268	202,831	210,881	212,540	214,215
2800 Employer Provided Benefits								
Medicare & Social Security	50,328	3.5% of certified + non-certified salaries.	52,898	54,272	55,830	61,143	62,041	62,956
Life & Disability Insurance	3,296	Flat @ average of \$3,200 per annum.	3,200	3,200	3,200	3,200	3,200	3,200
Health & Dental Insurance	277,141	17.5% of certified + non-certified salaries.	264,491	271,362	279,151	305,714	310,207	314,782
Non-Certified Retirement Plan	68,800	New plan: 5.0% of non-certified salaries.	21,335	21,762	22,197	24,507	24,997	25,497
Unemployment, TRB & ERIP	15,298	Flat @ average of \$16,000 per annum.	16,000	16,000	16,000	16,000	16,000	16,000
Subtotal	414,863		357,924	366,596	376,378	410,564	416,445	422,435
All Other	8,625	Flat @ average of \$8,500.	8,500	8,500	8,500	8,500	8,500	8,500
Total School Budget	2,574,449		2,637,523	2,689,084	2,747,052	2,952,153	2,987,686	3,023,851
Other Expenses								
Insurance	38,725	Flat @ \$38,725 per annum.	38,725	38,725	38,725	38,725	38,725	38,726
Other Town Provided	34,552	Inflation rate: 2% per annum.	35,948	36,667	37,400	41,293	42,119	42,961
Town Provided Services	73,277		74,673	75,392	76,125	80,018	80,844	81,687
Debt Service	128,738	Flat @ \$128,738 per annum.	128,738	128,738	128,738	128,738	128,738	128,739
Subtotal	202,014		203,411	204,130	204,863	208,756	209,582	210,426
Total Budget	2,776,463		2,840,934	2,893,214	2,951,915	3,160,909	3,197,268	3,234,277

**Norfolk/Colebrook Study Committee
Colebrook Forecast**

Description	Budget	Forecast Assumptions	Forecast					
	2014-15		2016-17	2017-18	2018-19	2023-24	2024-25	2025-26
1000 Regular Education								
Teachers	651,330	Colebrook teachers' contract: steps + 1% GWI annually.	693,315	714,776	735,059	810,291	821,597	833,048
Educational Assistants	73,993	Inflation rate: 2% per annum.	76,982	78,522	80,092	88,429	90,198	92,002
Substitutes	13,000	Inflation rate: 2% per annum.	13,525	13,796	14,072	15,537	15,848	16,165
Field Trips, Cultural & Environmental	1,725	Flat @ average of \$1,900	1,900	1,900	1,900	1,900	1,900	1,900
Textbooks, Supplies & Curriculum	17,536	Flat @ average of \$18,000	18,000	18,000	18,000	18,000	18,000	18,000
Instructional Equipment & Repairs	0	Flat @ average of \$6	6	6	6	6	6	6
Tests, Scoring & Dues	3,300	Flat @ average of \$3,500	3,500	3,500	3,500	3,500	3,500	3,500
Subtotal	760,884		807,228	830,500	852,629	937,663	951,049	964,621
1200 Special Education								
Special Education Teachers	67,585	Colebrook teachers' contract: steps + 1% GWI annually.	73,682	77,500	81,386	95,292	96,245	97,207
Aides, Substitutes & Therapists	22,125	Inflation rate: 2% per annum.	23,019	23,479	23,949	26,441	26,970	27,509
Special Education Tuition	112,310	Flat @ average of \$105,000	105,000	105,000	105,000	105,000	105,000	105,000
Shared Services	99,675	Flat @ average of \$95,000.	95,000	95,000	95,000	95,000	95,000	95,000
Special Ed - Support Services	0	Nil						
Testing & Supplies	0	Nil						
Subtotal	301,695		296,701	300,979	305,335	321,733	323,215	324,716
2100 Health Supportive Services								
School Nurse	34,129	Inflation rate: 2% per annum.	35,508	36,218	36,942	40,788	41,604	42,436
Other Health Support	1,715	Flat @ average of \$1,700.	1,700	1,700	1,700	1,700	1,700	1,700
Subtotal	35,844		37,208	37,918	38,642	42,488	43,304	44,136
2220 Media & Computer Services								
Media Specialist	17,176	Colebrook teachers' contract: steps + 1% GWI annually.	17,776	17,954	18,133	19,058	19,249	19,441
Computer/Technology Support	0	Flat @ average of \$750	750	750	750	750	750	750
Library Books, Periodicals & Software	9,730	Flat @ average of \$9,000	9,000	9,000	9,000	9,000	9,000	9,000
Equipment & Repairs	0	Nil						
Dues & Fees - Library	0	Nil						
Subtotal	26,906		27,526	27,704	27,883	28,808	28,999	29,191
2310 Board of Education								
	7,450	Flat @ average of \$7,550	7,550	7,550	7,550	7,550	7,550	7,550
2320 Superintendent's Office								
Superintendent	53,550	Inflation rate: 2% per annum.	55,713	56,827	57,964	63,996	65,276	66,582
Fiscal & Payroll Staff	32,288	Inflation rate: 2% per annum.	33,593	34,265	34,950	38,588	39,360	40,147
Other Superintendent	5,050	Flat @ average of \$5,100	5,100	5,100	5,100	5,100	5,100	5,100
Subtotal	90,888		94,406	96,192	98,014	107,684	109,736	111,829

Description	Budget	Forecast Assumptions	Forecast					
	2014-15		2016-17	2017-18	2018-19	2023-24	2024-25	2025-26
2400 Support Services - Administration								
Principal	101,782	Inflation rate: 2% per annum.	105,894	108,012	110,172	121,638	124,071	126,552
Secretary & Head Teacher	43,672	Inflation rate: 2% per annum.	45,436	46,345	47,272	52,191	53,235	54,300
Other Administrative Support	11,050	Flat @ average of \$6,000	6,000	6,000	6,000	6,000	6,000	6,000
Subtotal	156,504		157,330	160,357	163,444	179,829	183,306	186,852
2600 Operations & Maintenance								
Custodial Staff	41,423	Inflation rate: 2% per annum.	43,096	43,958	44,837	49,505	50,495	51,505
Overtime & Summer Help	750	Flat @ average of \$750 per annum.	750	750	750	750	750	750
Service Contracts & Supplies	12,355	Inflation rate: 2% per annum.	12,854	13,111	13,373	14,765	15,060	15,060
Water	8,300	Flat @ average of \$6,000	6,000	6,000	6,000	6,000	6,000	6,000
Electricity	20,000	Inflate 2013-14 @1% per annum.	20,402	20,606	20,812	21,873	22,092	22,313
Heating Oil	39,600	Inflate 2013-14 @1% per annum.	40,396	40,800	41,208	43,310	43,743	44,180
Building Repairs & Improvements	14,210	Flat @ average of \$14,500	14,500	14,500	14,500	14,500	14,500	14,500
Equipment & Repairs	6,615	Flat @ average of \$10,500	10,500	10,500	10,500	10,500	10,500	10,500
Subtotal	143,253		148,498	150,225	151,980	161,203	163,140	164,808
2700 Student Transportation								
Regular Transportation	83,353	Inflate 2013-14 @ 1% per annum.	86,720	88,454	90,223	99,613	101,605	103,637
Special Ed Transportation	24,361	Flat @ average of \$24,000	24,000	24,000	24,000	24,000	24,000	24,000
Subtotal	107,714		110,720	112,454	114,223	123,613	125,605	127,637
2800 Employer Provided Benefits								
Medicare & Social Security	38,440	3.5% of certified + non-certified salaries.	42,140	43,325	44,476	49,218	49,991	50,776
Life & Disability Insurance	2,660	Flat @ average of \$2,600	2,600	2,600	2,600	2,600	2,600	2,601
Health & Dental Insurance	187,530	16.0% of certified + non-certified salaries.	192,642	198,057	203,321	224,995	228,528	232,117
Non-Certified Retirement Plan	11,868	7.0% of non-certified salaries.	18,034	18,395	18,763	20,716	21,130	21,553
Unemployment, TRB & ERIP	150	Flat @ average of \$500	500	500	500	500	500	500
Subtotal	240,648		255,916	262,877	269,660	298,029	302,749	307,547
All Other	0	Nil						
Total School Budget	1,871,786		1,943,083	1,986,756	2,029,360	2,208,600	2,238,653	2,268,887
Other Expenses								
Insurance	18,657	Flat @ \$18,700 per annum.	18,700	18,700	18,700	18,700	18,700	18,701
Other Town Provided	32,523	Inflation rate: 2% per annum.	33,836	34,513	35,203	38,867	39,644	40,437
Town Provided Services	51,180		52,536	53,213	53,903	57,567	58,344	59,138
Debt Service	0	Nil	0	0	0	0	0	0
Subtotal	51,180		52,536	53,213	53,903	57,567	58,344	59,138
Total Budget	1,922,966		1,995,619	2,039,969	2,083,263	2,266,167	2,296,997	2,328,025

**Norfolk/Colebrook Study Committee
2014-15 Pro Forma Budget**

Line #	Description	2014-15 Budget			Pro Forma	
		Norfolk	Colebrook	Combined	Changes	Pro Forma
1000 Regular Education						
10-1	Teachers	742,876	651,330	1,394,206	(14,351)	1,379,855
10-2	Educational Assistants	98,072	73,993	172,065	46,890	218,955
10-3	Substitutes	11,300	13,000	24,300		24,300
10-4	Field Trips, Cultural & Environmental	9,275	1,725	11,000		11,000
10-5	Textbooks, Supplies & Curriculum	20,500	17,536	38,036		38,036
10-6	Instructional Equipment & Repairs	1,780	0	1,780		1,780
10-7	Tests, Scoring & Dues	1,392	3,300	4,692		4,692
	Subtotal	885,195	760,884	1,646,079		1,678,618
1200 Special Education						
12-1	Special Education Teachers	73,859	67,585	141,444	907	142,351
12-2	Aides, Substitutes & Therapists	33,032	22,125	55,157		55,157
12-3	Special Education Tuition	50,089	112,310	162,399		162,399
12-4	Shared Services	130,355	99,675	230,030	(34,505)	195,526
12-5	Special Ed - Support Services	39,500	0	39,500		39,500
12-6	Testing & Supplies	2,500	0	2,500		2,500
	Subtotal	329,335	301,695	631,030		597,433
2100 Health Supportive Services						
21-1	School Nurse	38,825	34,129	72,954	(34,129)	38,825
21-2	Other Health Support	3,500	1,715	5,215		5,215
	Subtotal	42,325	35,844	78,169		44,040
2220 Media & Computer Services						
22-1	Media Specialist	53,032	17,176	70,208	18,178	88,386
22-2	Computer/Technology Support	11,380	0	11,380		11,380
22-3	Library Books, Periodicals & Software	3,964	9,730	13,694	(2,739)	10,955
22-4	Equipment & Repairs	10,000	0	10,000		10,000
22-5	Dues & Fees - Library	850	0	850		850
	Subtotal	79,226	26,906	106,132		121,571
23-1	2310 Board of Education	27,805	7,450	35,255		35,255
2320 Superintendent's Office						
23-2	Superintendent	56,000	53,550	109,550	(53,550)	56,000
23-4	Fiscal & Payroll Staff	89,463	32,288	121,751	(21,168)	100,583
23-5	Other Superintendent	14,588	5,050	19,638		19,638
	Subtotal	160,051	90,888	250,939		176,221

Line #	Description	2014-15 Budget			Pro Forma	
		Norfolk	Colebrook	Combined	Changes	Pro Forma
2400 Support Services - Administration						
24-1	Principal	100,000	101,782	201,782	(101,782)	100,000
24-2	Secretary & Head Teacher	47,142	43,672	90,814	(41,672)	49,142
24-3	Other Administrative Support	11,905	11,050	22,955	(4,750)	18,205
	Subtotal	159,047	156,504	315,551		167,347
2600 Operations & Maintenance						
25-1	Custodial Staff	103,591	41,423	145,014	(16,415)	128,600
25-2	Overtime & Summer Help	6,075	750	6,825		6,825
25-3	Service Contracts & Supplies	44,604	12,355	56,959	(12,355)	44,604
25-4	Water	2,895	8,300	11,195	(8,300)	2,895
25-5	Electricity	31,000	20,000	51,000	(20,000)	31,000
25-6	Heating Oil	58,950	39,600	98,550	(39,600)	58,950
25-7	Building Repairs & Improvements	13,850	14,210	28,060	(14,210)	13,850
25-8	Equipment & Repairs	1,700	6,615	8,315	(6,615)	1,700
	Subtotal	262,665	143,253	405,918		288,424
2700 Student Transportation						
27-1	Regular Transportation	151,672	83,353	235,025	(13,025)	222,000
27-2	Special Ed Transportation	53,640	24,361	78,001		78,001
	Subtotal	205,312	107,714	313,026		300,001
2800 Employer Provided Benefits						
28-1	Medicare & Social Security	50,328	38,440	88,768		88,768
28-2	Life & Disability Insurance	3,296	2,660	5,956		5,956
28-3	Health & Dental Insurance	277,141	187,530	464,671		464,671
28-4	Non-Certified Retirement Plan	68,800	11,868	80,668		80,668
28-5	Unemployment, TRB & ERIP	15,298	150	15,448		15,448
	Subtotal	414,863	240,648	655,511		655,511
	All Other	8,625	0	8,625		8,625
	Total School Budget	2,574,449	1,871,786	4,446,235	(373,190)	4,073,046
Town Provided Services						
	Insurance	38,725	18,657	57,382	(10,980)	46,402
	Other Town Provided Services	34,552	32,523	67,074	(32,523)	34,552
	Town Provided	73,277	51,180	124,456		80,954
	Total Budget	2,647,726	1,922,966	4,570,691	(416,692)	4,153,999

**Norfolk/Colebrook Study Committee
2014-15 Pro Forma & Other Changes**

Line #	Description	Amount	Calculation
Pro Forma Changes			
10-1	Shift art teacher to Norfolk contract; adjust longevity pay.	845	Equals: $(\$84,454 \times 0.6) + \$360 - \$50,187$
10-1	Decrease general music/string teacher from 0.8 to 0.6 FTE.	(16,203)	Equals: $(\$84,454 \times 0.6) - \$66,875$
10-1	Decrease instrumental music teacher from 0.7 to 0.4 FTE.	(13,089)	Equals: $(\$45,207 \times 0.4) - \$31,172$
10-1	Retain senior physical education teacher; convert to Norfolk contract.	19,112	Equals: $(\$84,454 \times 0.8) - \$48,451$
10-1	Reduce reading specialists from 1.5 to 1.0 FTE.	(23,869)	Retain senior teacher: $\$88,386 - \$112,255$
10-1	Convert Colebrook regular ed teachers to Norfolk salary schedule.	(9,667)	
10-1	Increase world language teacher from 0.6 to 0.7 FTE.	9,855	Retain senior teacher: $(\$82,697 \times 0.7) - \$48,033$
10-1	Increase preschool teacher from 0.3 to 0.6 FTE.	18,665	Current staff retained.
10-2	Reduce paraprofessionals by 0.3 FTE; convert to Norfolk pay scale.	40,022	Equals: $(5.0 \times \$22,803) - \$73,993$
10-2	Increase preschool aide from 0.3 to 0.6 FTE.	6,868	Current staff retained.
12-1	Convert Colebrook special ed teacher to Norfolk salary schedule.	907	
12-4	Assume 15% saving to Shared Services.	(34,505)	Equals: $(\$130,355 + \$99,675) \times 0.15$
21-1	Reduce nurses by 1.0 FTE.	(34,129)	Based on Norfolk scale.
22-1	Increase library/digital learning/IT staff from 0.8 to 1.0 FTE.	18,178	Based on Norfolk scale: $\$88,386 - \$70,208$
22-3	Assume 20% savings on library books & software.	(2,739)	Equals: $\$13,694 \times 0.2$
23-2	Reduce superintendents by 0.45 FTE.	(53,550)	Based on Norfolk scale.
23-4	Reduce bookkeepers by 0.5 FTE.	(21,168)	Equals: $(\$32,288 \div 0.8) - \$62,268$
24-1	Reduce principals by 1.0 FTE.	(101,782)	Based on Norfolk scale.
24-2	Reduce secretaries by 1.0 FTE.	(41,672)	Based on Norfolk scale.
24-3	Eliminate Colebrook telephone expense.	(4,750)	Line item 5310
25-1	Reduce custodial staff by 0.75 FTE.	(16,415)	Based on Norfolk scale: $\$53,575 + (\$50,017 \times 1.5) - \$145,105$
26-x	Eliminate Colebrook operations and maintenance expense.	(101,080)	Equals: $\$12,355 + \$8,300 + \$20,000 + \$39,600 + \$14,210 + \$6,615$
27-1	Assume 7 busses @ \$31,000 each.	(13,025)	Equals: $(7 \times \$31,000) - \$235,025$
	Total	(373,190)	
Town Provided Services			
	Eliminate Colebrook liability insurance.	(10,980)	Workers compensation of \$7,677 remains.
	Eliminate Colebrook's other town-provided services.	(32,523)	Equals: $\$786 + \$3,120 + \$23,102 + \$5,515$
	Total	(43,503)	
Adjustments to Original Budgets			
10-1	Replace retiring Colebrook M/2 with an M/11.	26,817	Staff list minus budget: $\$75,057 - \$48,240$
10-1	Replace retiring Colebrook M/11 with an M+30/7.	(7,472)	Staff list minus budget: $\$67,585 - \$75,057$
10-1	Adjust part time M/max to FTE x salary schedule.	467	Staff list minus budget: $0.8 \times \$82,515 - \$65,545$
24-1	Post budget adjustment to Colebrook principal.	496	Staff list minus budget: $\$101,782 - \$101,286$
10-1	Conform Norfolk budget for teachers to staff list.	(64)	Staff list minus budget: $\$742,876 - \$742,940$
10-2	Add back grant netted against Norfolk paraprofessionals.	28,703	Staff list minus budget: $\$98,072 - \$69,369$
24-1	Favorable variance on Norfolk's new principal.	(4,190)	Staff list minus budget: $\$100,000 - \$104,190$
	Total	44,757	

**Norfolk/Colebrook Study Committee
2014-15 Pro Forma Staffing**

Position	Combined		Changes		Degree	Step	Pro Forma		Long Pay
	FTE	Salary	FTE	Salary			FTE	Salary	
Teachers									
Preschool Teacher	0.3	18,665	0.3	18,665	M	8	0.6	37,330	
Kindergarten Teacher	1.0	73,859			M	12	1.0	73,859	
Kindergarten Teacher	1.0	74,394		(1,431)	M+15	10	1.0	72,963	
1st Grade Teacher	1.0	89,386			M+30	Max	1.0	89,386	1,000
1st Grade Teacher	1.0	88,114		2,506	M+30	Max	1.0	90,620	2,234
2nd Grade Teacher	1.0	85,254			M	Max	1.0	85,254	800
2nd Grade Teacher	1.0	81,015		(5,067)	M	13	1.0	75,948	
3rd Grade Teacher	1.0	85,254			M	Max	1.0	85,254	800
3rd Grade Teacher	1.0	48,890		(36)	B+15	3	1.0	48,854	
4th Grade Teacher	1.0	85,054			M	Max	1.0	85,054	600
4th Grade Teacher	1.0	75,057		(2,660)	M	11	1.0	72,397	
5th Grade Teacher	1.0	43,607			B	1	1.0	43,607	
5th Grade Teacher	1.0	48,240		923	M	2	1.0	49,163	
6th Grade Teacher	1.0	73,859			M	12	1.0	73,859	
6th Grade Teacher	1.0	66,118		(3,902)	M	8	1.0	62,216	
Art Teacher	0.6	50,187		845	M	Max	0.6	51,032	360
General Music/String	0.8	66,875	(0.2)	(16,203)	M	Max	0.6	50,672	
Instrumental Music	0.7	31,172	(0.3)	(13,089)	B	2	0.4	18,083	
World Language	0.6	48,033	0.1	9,855	M+30	13	0.7	57,888	
Physical Ed/Health	0.8	48,451		19,112	M	Max	0.8	67,563	
Reading Specialist	1.5	112,255	(0.5)	(23,869)	M+30	Max	1.0	88,386	
Subtotal Teachers	19.3	1,393,739	(0.6)	(14,351)			18.7	1,379,388	5,794
Other Certified									
Special Ed	1.0	73,859			M	12	1.0	73,859	
Special Ed	1.0	67,585		907	M+30	7	1.0	68,492	
Library/Digital Learning/IT	0.8	70,208	0.2	18,178	M+30	Max	1.0	88,386	
Subtotal Other Certified	2.8	211,652	0.2	19,085			3.0	230,737	
Administration									
Superintendent	0.90	109,550	(0.45)	(53,550)			0.45	56,000	
Prinipal	2.0	201,782	(1.0)	(101,782)			1.0	100,000	
Subtotal Administration	2.9	311,332	(1.5)	(155,332)			1.5	156,000	
Paraprofessionals									
Regular Education	8.3	142,403	(0.3)	40,022			8.0	182,425	
PreSchool	0.3	6,868	0.3	6,868			0.6	13,736	
Tutor	1.0	22,794					1.0	22,794	
Subtotal Paraprofessionals	9.6	172,065	0.0	46,890			9.6	218,955	
Non-Certified									
Secretary/Admin Assistant	2.0	87,564	(1.0)	(41,672)			1.0	45,892	
Superintendent/Finance	1.0	59,483					1.0	59,483	
Bookkeeper/Payroll	1.5	62,268	(0.5)	(21,168)			1.0	41,100	
Custodians	3.3	145,015	(0.8)	(16,415)			2.5	128,601	
Nurse	2.0	72,983	(1.0)	(34,129)			1.0	38,854	
Subtotal Non-Certified	9.8	427,313	(3.3)	(113,384)			6.5	313,930	
Totals									
Certified	22.1	1,605,391	(0.4)	4,734			21.7	1,610,125	
Administration	2.90	311,332	(1.45)	(155,332)			1.45	156,000	
Non-Certified & Para	19.4	599,378	(3.3)	(66,494)			16.1	532,885	
Total	44.35	2,516,101	(5.10)	(217,091)			39.25	2,299,010	

**Norfolk/Colebrook Study Committee
Current Staffing Levels - Norfolk**

Position	Degree	2013-14			Degree	2014-15			Long Pay
		Step	FTE	Salary		Step	FTE	Salary	
Teachers									
Preschool Teacher	B+15	7	0.3	17,004	M	8	0.3	18,665	
Kindergarten Teacher	M	11	1.0	70,839	M	12	1.0	73,859	
1st Grade Teacher	M+30	Max	1.0	87,483	M+30	Max	1.0	89,386	1,000
2nd Grade Teacher	M	Max	1.0	83,436	M	Max	1.0	85,254	800
3rd Grade Teacher	M	Max	1.0	83,436	M	Max	1.0	85,254	800
4th Grade Teacher	M	Max	1.0	83,236	M	Max	1.0	85,054	600
5th Grade Teacher	M	2	1.0	48,105	B	1	1.0	43,607	
6th Grade Teacher	M	11	1.0	70,839	M	12	1.0	73,859	
Art Teacher	M	Max	0.3	24,791	M	Max	0.3	25,516	180
General Music/String	M	Max	0.6	49,582	M	Max	0.6	50,672	
Instrumental Music	B	1	0.3	12,806	B	2	0.3	13,562	
World Language	M+15	11	0.4	29,795	M+15	12	0.4	30,857	
Physical Ed/Health	B	1	0.4	17,067	M	1	0.5	23,780	
Reading Specialist	B+15	7	0.7	39,676	M	8	0.7	43,551	
Subtotal Teachers			10.0	718,095			10.1	742,876	
Other Certified									
Special Ed	M	11	1.0	70,839	M	12	1.0	73,859	
Library/Digital Learning/IT	M+30	Max	0.6	51,890	M+30	Max	0.6	53,032	
Subtotal Other Certified			1.6	122,729			1.6	126,891	
Administration									
Superintendent			0.45	58,105			0.45	56,000	
Prinipal			1.0	100,969			1.0	100,000	
Subtotal Administration			1.5	159,074			1.5	156,000	
Paraprofessionals									
Regular Education	Rate	Hours			Rate	Hours			
Regular Education	17.64	1255	3.0	66,388	18.17	1255	3.0	68,410	
PreSchool	17.64	405	0.3	7,149	18.17	378	0.3	6,868	
Tutor	17.64	1255	1.0	22,129	18.17	1255	1.0	22,794	
Subtotal Paraprofessionals			4.3	95,666			4.3	98,072	
Non-Certified									
Secretary/Admin Assistant	20.87	1986	1.0	41,239	21.50	1950	1.0	45,892	
Superintendent/Finance			1.0	56,780			1.0	59,483	
Bookkeeper/Payroll	18.48	1534	0.7	28,348	19.03	1600	0.7	29,980	
Custodian 1	24.26	2080	1.0	50,461	24.99	2080	1.0	53,575	
Custodian 2	22.87	2080	1.0	47,570	23.56	2080	1.00	50,017	
Nurse 1	28.20	1312	1.0	36,998	29.43	791	0.6	23,279	
Nurse 2					28.63	544	0.4	15,575	
Subtotal Non-Certified			5.7	261,396			5.7	277,801	
Totals									
Certified			11.6	840,824			11.7	869,767	
Administration			1.5	159,074			1.5	156,000	
Non-Certified & Para			10.0	357,062			10.0	375,873	
Total			23.05	1,356,960			23.15	1,401,640	

**Norfolk/Colebrook Study Committee
Current Staffing Levels - Colebrook**

Position	2013-14				2014-15				Long Pay
	Degree	Step	FTE	Salary	Degree	Step	FTE	Salary	
Teachers									
Preschool Teacher									
Kindergarten Teacher	M+15	10	1.0	72,525	M+15	10	1.0	74,394	
1st Grade Teacher	M+30	Max	1.0	87,687	M+30	Max	1.0	88,114	2,234
2nd Grade Teacher	M	2	1.0	46,519	M	13	1.0	81,015	
3rd Grade Teacher	B+15	3	1.0	47,243	B+15	3	1.0	48,890	
4th Grade Teacher	M	Max	1.0	79,130	M	11	1.0	75,057	
5th Grade Teacher	M	2	1.0	46,519	M	2	1.0	48,240	
6th Grade Teacher	M	8	1.0	64,308	M	8	1.0	66,118	
Art Teacher	M	Max	0.3	24,550	M	Max	0.3	24,755	
General Music/String	M	Max	0.2	16,122	M	Max	0.2	16,503	
Instrumental Music	B	1	0.4	16,968	B	2	0.4	17,610	
World Language	M+30	Max	0.2	16,787	M+30	13	0.2	17,176	
Physical Ed/Health	M	Max	0.3	24,550	M	Max	0.3	24,755	
Reading Specialist	M+30	Max	0.8	68,362	M+30	Max	0.8	68,704	
Subtotal Teachers			9.2	611,270			9.2	651,331	
Other Certified									
Special Ed	M	11	1.0	73,202	M+30	7	1.0	67,585	
Library/Digital Learning/IT	M+30	Max	0.2	17,091	M+30	Max	0.2	17,176	
Subtotal Other Certified			1.2	90,293			1.2	84,761	
Administration									
Superintendent			0.45	52,500			0.45	53,550	
Principal			1.0	99,300			1.0	101,782	
Subtotal Administration			1.5	151,800			1.5	155,332	
Paraprofessionals									
Regular Education	Rate	Hours			Rate	Hours			
PreSchool	11.57	1215	5.3	74,557	11.49	1215	5.3	73,993	
Tutor									
Subtotal Paraprofessionals			5.3	74,557			5.3	73,993	
Non-Certified									
Secretary/Admin Assistant	20.95	1950	1.0	40,853	21.37	1950	1.0	41,672	
Superintendent/Finance									
Bookkeeper/Payroll	19.78	1600	0.8	31,648	20.18	1600	0.8	32,288	
Custodian 1	16.32	2080	1.0	33,946	17.14	2080	1.0	35,651	
Custodian 2	10.20	555	0.25	5,661	10.40	555	0.25	5,772	
Nurse	27.54	1215	1.0	33,461	28.09	1215	1.0	34,129	
Subtotal Non-Certified			4.1	145,569			4.1	149,512	
Totals									
Certified			10.4	701,563			10.4	736,092	
Administration			1.5	151,800			1.5	155,332	
Non-Certified & Para			9.4	220,126			9.4	223,505	
Total			21.20	1,073,489			21.20	1,114,929	

**Norfolk/Colebrook Study Committee
Combined Budget History & Forecast Assumptions**

Description	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	Forecast Assumptions	Average	
								4 Way	Weighted
1000 Regular Education									
Teachers	1,444,811	1,462,187	1,484,477	1,343,683	1,363,672	1,394,206	Norfolk teachers' contract: steps + 1% GWI annually.		
Educational Assistants	133,176	125,457	132,396	151,235	162,602	172,065	Inflation rate: 2% per annum.		
Substitutes	24,843	23,777	22,321	36,521	36,077	24,300	Inflation rate: 2% per annum.		
Field Trips, Cultural & Environmental	9,234	10,506	9,814	10,859	9,222	11,000	Flat @ average of \$10,500.	10,103	10,249
Textbooks, Supplies & Curriculum	35,900	24,573	36,526	53,696	33,908	38,036	Flat @ average of \$39,000.	36,093	38,437
Instructional Equipment & Repairs	3,920	516	5,271	2,314	255	1,780	Flat @ average of \$2,200.	2,132	1,999
Tests, Scoring & Dues	4,870	4,726	4,766	2,818	5,328	4,692	Flat @ average of \$4,800.	4,763	4,509
Subtotal	1,656,754	1,651,742	1,695,570	1,601,126	1,611,065	1,646,079			
1200 Special Education									
Special Education Teachers	118,255	126,177	133,559	141,077	144,041	141,444	Norfolk teachers' contract: steps + 1% GWI annually.		
Aides, Substitutes & Therapists	49,286	37,049	44,353	51,127	54,251	55,157	Inflation rate: 2% per annum.		
Special Education Tuition	137,389	179,433	128,791	89,171	149,869	162,399	Flat @ average of \$145,000.	144,612	141,098
Shared Services	213,509	203,205	220,567	225,085	219,245	230,030	Flat @ 85% of average: \$195,000	219,602	221,827
Special Ed - Support Services	43,410	41,830	51,244	47,884	28,519	39,500	Flat @ average of \$43,000.	43,156	40,568
Testing & Supplies	1,002	565	322	316	99	2,500	Flat @ average of \$1,000.	551	945
Subtotal	562,851	588,258	578,836	554,660	596,023	631,030			
2100 Health Supportive Services									
School Nurse	71,488	72,433	73,368	74,853	71,766	72,954	Inflation rate: 2% per annum.		
Other Health Support	4,835	3,566	4,048	4,814	4,722	5,215	Flat @ average of \$4,800.	4,605	4,679
Subtotal	76,323	75,999	77,416	79,667	76,488	78,169			
2220 Media & Computer Services									
Media Specialist	66,617	13,601	67,095	68,811	68,981	70,208	Norfolk teachers' contract: steps + 1% GWI annually.		
Computer/Technology Support	23,350	3,227	10,493	11,172	11,101	11,380	Flat @ average of \$11,900.	11,037	10,941
Library Books, Periodicals & Software	12,141	12,426	16,560	13,455	14,231	13,694	Flat @ 80% of average: \$11,200	13,452	13,991
Equipment & Repairs	27,080	13,751	6,833	8,798	1,137	10,000	Flat @ average of \$11,000	9,845	8,379
Dues & Fees - Library	829	829	829	829	829	850	Flat @ average of \$850	829	835
Subtotal	130,017	43,834	101,811	103,065	96,279	106,132			
2310 Board of Education									
	24,080	22,990	23,860	46,395	43,293	35,255	Flat @ average of \$35,000.	31,622	35,963
2320 Superintendent's Office									
Superintendent	100,920	106,023	103,660	109,466	110,605	109,550	Inflation rate: 2% per annum.		
Fiscal & Payroll Staff	108,264	108,012	111,053	114,009	117,227	121,751	Inflation rate: 2% per annum.		
Other Superintendent	20,308	17,150	13,422	19,133	18,629	19,638	Flat @ average of \$19,000.	18,638	18,209
Subtotal	229,492	231,185	228,135	242,608	246,460	250,939			

Description	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	Forecast Assumptions	4 Way	Weighted
2400 Support Services - Administration									
Principal	183,177	192,293	194,111	199,322	201,269	201,782	Inflation rate: 2% per annum.		
Secretary & Head Teacher	74,356	75,709	78,250	84,056	88,075	90,814	Inflation rate: 2% per annum.		
Other Administrative Support	16,008	11,623	8,893	11,751	11,866	22,955	Flat @ average of \$14,000.	12,812	14,762
Subtotal	273,541	279,624	281,254	295,129	301,210	315,551			
2600 Operations & Maintenance									
Custodial Staff	136,942	137,119	145,483	134,915	136,821	145,014	Inflation rate: 2% per annum.		
Overtime & Summer Help	5,950	10,915	9,830	9,085	12,240	6,825	Flat @ \$9,200 per annum.	9,163	9,322
Service Contracts & Supplies	43,511	44,563	47,392	49,434	53,758	56,959	Inflation rate: 2% per annum.		
Water	6,676	6,419	8,047	11,670	8,060	11,195	Flat @ Norfolk average of \$3,000 per annum.	8,494	9,419
Electricity	56,725	51,850	44,425	42,892	44,032	51,000	Inflate Norfolk 2013-14 @1% p.a.		
Heating Oil	76,124	63,310	80,841	85,904	94,225	98,550	Inflate Norfolk 2013-14 @1% p.a.		
Building Repairs & Improvements	49,569	74,598	57,639	47,416	56,333	28,060	Flat @ Norfolk average of \$40,000 per annum.	52,739	48,160
Equipment & Repairs	26,019	48,148	17,035	34,293	30,655	8,315	Flat @ Norfolk average of \$15,200 per annum.	27,001	24,465
Subtotal	401,516	436,921	410,691	415,609	436,124	405,918			
2700 Student Transportation									
Regular Transportation	229,020	229,053	222,169	223,119	228,925	235,025	7 busses @ \$31,000 each: inflate 1% per annum.		
Special Ed Transportation	47,938	30,686	32,530	49,684	67,354	78,001	Flat @ average of \$50,000 per annum.	49,376	57,639
Subtotal	276,957	259,739	254,699	272,803	296,279	313,026			
2800 Employer Provided Benefits									
Medicare & Social Security	72,439	77,514	82,894	84,179	87,506	88,768	3.5% of certified + non-certified salaries.		
Life & Disability Insurance	5,388	5,309	5,343	5,722	5,527	5,956	Flat @ \$5,700 per annum.	5,495	5,633
Health & Dental Insurance	346,132	400,977	410,444	444,621	415,557	464,671	17.5% of certified + non-certified salaries.		
Non-Certified Retirement Plan	50,982	59,388	53,133	50,176	82,620	80,668	5.0% of non-certified salaries.		
Unemployment, TRB & ERIP	30,905	15,442	3,119	15,164	28,596	15,448	Flat @ \$18,000 per annum.	18,663	17,499
Subtotal	505,846	558,630	554,932	599,861	619,806	655,511			
All Other	5,487	5,120	14,304	8,363	6,301	8,625	Flat @ \$9,000 per annum.	7,194	8,350
Total School Budgets	4,142,863	4,154,043	4,221,507	4,219,285	4,329,327	4,446,235			
Other Expenses									
Insurance	0	0	0	0	57,382	0	Flat @ pro forma amount: \$46,500.		
Other Town Provided Services					67,074	0	Inflation rate: 2% per annum.		
Town Provided	0	0	0	0	124,456	0			
Debt Service					128,738	0	Flat @ \$128,738 per annum.		
Subtotal	0	0	0	0	253,194	0			
Total Budget	4,142,863	4,154,043	4,221,507	4,219,285	4,582,521	4,446,235			

**Norfolk/Colebrook Study Committee
Norfolk Budget History & Forecast Assumptions**

Description	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	Forecast Assumptions	Average	
								4 Way	Weighted
1000 Regular Education									
Teachers	764,272	800,154	824,526	767,013	762,507	742,876	Norfolk teachers' contract: steps + 1% GWI annually.		
Educational Assistants	67,954	66,871	69,197	81,554	91,137	98,072	Inflation rate: 2% per annum.		
Substitutes	14,047	12,665	10,267	11,718	10,406	11,300	Inflation rate: 2% per annum.		
Field Trips, Cultural & Environmental	8,481	9,209	8,135	8,115	6,978	9,275	Flat @ average of \$9,000.	8,485	8,300
Textbooks, Supplies & Curriculum	25,624	17,957	20,654	31,735	15,029	20,500	Flat @ average of \$21,500.	21,184	21,361
Instructional Equipment & Repairs	3,920	516	5,252	2,289	255	1,780	Flat @ average of \$2,200.	2,126	1,991
Tests, Scoring & Dues	879	1,192	314	503	1,004	1,392	Flat @ average of \$1,200.	895	933
Subtotal	885,177	908,564	938,345	902,928	887,316	885,195			
1200 Special Education									
Special Education Teachers	56,911	61,869	66,287	70,839	70,839	73,859	Norfolk teachers' contract: steps + 1% GWI annually.		
Aides, Substitutes & Therapists	37,395	22,273	28,969	32,288	31,628	33,032	Inflation rate: 2% per annum.		
Special Education Tuition	6,479	16,481	27,151	35,522	76,192	50,089	Flat @ average of \$51,000.	32,311	44,975
Shared Services	137,169	124,527	137,220	128,992	126,047	130,355	Flat @ 85% of average: \$132,000.	130,641	129,820
Special Ed - Support Services	43,410	41,830	51,244	47,884	28,519	39,500	Flat @ average of \$44,000.	43,156	40,568
Testing & Supplies	1,002	565	322	316	99	2,500	Flat @ average of \$1,500.	551	945
Subtotal	282,365	267,545	311,192	315,841	333,323	329,335			
2100 Health Supportive Services									
School Nurse	39,570	39,883	40,490	42,048	38,305	38,825	Inflation rate: 2% per annum.		
Other Health Support	4,103	1,516	3,049	2,902	2,881	3,500	Flat @ average of \$3,100.	3,083	3,014
Subtotal	43,673	41,399	43,539	44,950	41,186	42,325			
2220 Media & Computer Services									
Media Specialist	50,650	3,453	50,302	51,890	51,890	53,032	Norfolk teachers' contract: steps + 1% GWI annually.		
Computer/Technology Support	20,500	377	10,270	11,172	11,036	11,380	Flat @ average of 11,000.	10,964	10,486
Library Books, Periodicals & Software	6,720	6,353	9,693	7,448	3,768	3,964	Flat @ average of \$6,100.	6,121	5,758
Equipment & Repairs	27,080	13,751	6,833	8,798	1,137	10,000	Flat @ average of \$10,000.	9,845	8,379
Dues & Fees - Library	829	829	829	829	829	850	Flat @ average of \$830.	829	835
Subtotal	105,779	24,762	77,927	80,136	68,660	79,226			
2310 Board of Education									
	18,999	13,575	13,931	39,254	37,113	27,805	Flat @ average of \$28,000.	24,462	28,445
2320 Superintendent's Office									
Superintendent	53,420	55,023	56,208	56,966	58,105	56,000	Inflation rate: 2% per annum.		
Fiscal & Payroll Staff	79,622	78,263	81,000	83,063	85,579	89,463	Inflation rate: 2% per annum.		
Other Superintendent	16,369	12,834	7,488	14,607	12,957	14,588	Flat @ average of \$14,000.	13,747	13,107
Subtotal	149,411	146,120	144,697	154,636	156,641	160,051			

2400 Support Services - Administration

Principal	94,364	100,793	100,232	101,969	101,969	100,000	Inflation rate: 2% per annum.		
Secretary & Head Teacher	38,438	39,109	41,149	41,003	44,222	47,142	Inflation rate: 2% per annum.		
Other Administrative Support	13,707	8,979	5,327	8,233	8,322	11,905	Flat @ average of \$11,000.	9,360	9,220
Subtotal	146,509	148,881	146,709	151,205	154,513	159,047			

2600 Operations & Maintenance

Custodial Staff	95,083	94,208	100,946	97,732	100,430	103,591	Inflation rate: 2% per annum.		
Overtime & Summer Help	5,533	10,563	9,515	8,244	8,765	6,075	Flat @ average of \$8,100.	8,149	8,021
Service Contracts & Supplies	30,786	36,359	35,017	34,793	38,144	44,604	Inflation rate: 2% per annum.		
Water	2,599	2,634	2,936	2,690	2,588	2,895	Flat @ average of \$2,850.	2,704	2,750
Electricity	37,712	34,319	28,245	26,329	29,092	31,000	Inflation rate: 1% per annum.		
Heating Oil	46,883	44,207	50,943	53,249	55,171	58,950	Inflation rate: 1% per annum.		
Building Repairs & Improvements	37,647	62,342	43,600	38,625	40,224	13,850	Flat @ average of \$38,000.	40,024	34,850
Equipment & Repairs	21,741	41,375	8,839	14,925	13,204	1,700	Flat @ average of \$14,700.	14,677	12,711
Subtotal	277,985	326,006	280,040	276,585	287,617	262,665			

2700 Student Transportation

Regular Transportation	151,718	151,751	146,399	144,984	148,874	151,672	Inflation rate: 1% per annum.		
Special Ed Transportation	11,206	12,715	14,890	31,172	43,302	53,640	Flat @ average of \$45,000.	25,520	35,445
Subtotal	162,924	164,466	161,288	176,156	192,176	205,312			

2800 Employer Provided Benefits

Medicare & Social Security	45,732	47,091	48,858	49,301	49,996	50,328	3.5% of certified + non-certified salaries.	3.4%	3.4%
Life & Disability Insurance	2,966	2,972	3,183	3,064	3,112	3,296	Flat @ average of \$3,200 per annum.	3,083	3,145
Health & Dental Insurance	198,342	229,394	238,275	267,347	257,268	277,141	17.5% of certified + non-certified salaries.	17.3%	17.8%
Non-Certified Retirement Plan	47,437	55,773	29,424	14,145	65,605	68,800	New plan: 5.0% of non-certified salaries.	13.2%	12.5%
Unemployment, TRB & ERIP	30,905	1,480	2,694	15,164	28,596	15,298	Flat @ average of \$16,000 per annum.	15,438	16,065
Subtotal	325,383	336,710	322,435	349,021	404,578	414,863			

All Other	4,359	5,120	14,304	8,363	6,301	8,625	Flat @ average of \$8,500.	7,102	8,296
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Total School Budget	2,402,564	2,383,148	2,454,405	2,499,077	2,569,423	2,574,449			
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**Norfolk/Colebrook Study Committee
Colebrook Budget History & Forecast Assumptions**

Description	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	Forecast Assumptions	Average	
								4 Way	Weighted
1000 Regular Education									
Teachers	680,539	662,034	659,951	576,670	601,165	651,330	Colebrook teachers' contract: steps + 1% GWI annually.		
Educational Assistants	65,222	58,586	63,199	69,681	71,465	73,993	Inflation rate: 2% per annum.		
Substitutes	10,796	11,112	12,054	24,803	25,671	13,000	Inflation rate: 2% per annum.		
Field Trips, Cultural & Environmental	754	1,297	1,679	2,744	2,244	1,725	Flat @ average of \$1,900	1,736	1,949
Textbooks, Supplies & Curriculum	10,276	6,616	15,872	21,961	18,879	17,536	Flat @ average of \$18,000	15,641	17,075
Instructional Equipment & Repairs	0	0	19	25	0	0	Flat @ average of \$6	5	7
Tests, Scoring & Dues	3,990	3,534	4,452	2,315	4,324	3,300	Flat @ average of \$3,500	3,787	3,576
Subtotal	771,577	743,179	757,225	698,198	723,749	760,884			
1200 Special Education									
Special Education Teachers	61,344	64,308	67,272	70,238	73,202	67,585	Colebrook teachers' contract: steps + 1% GWI annually.		
Aides, Substitutes & Therapists	11,891	14,776	15,385	18,839	22,623	22,125	Inflation rate: 2% per annum.		
Special Education Tuition	130,911	162,952	101,640	53,649	73,676	112,310	Flat @ average of \$105,000	104,634	96,122
Shared Services	76,340	78,678	83,347	96,093	93,198	99,675	Flat @ average of \$95,000.	87,829	92,007
Special Ed - Support Services	0	0	0	0	0	0	Nil		
Testing & Supplies	0	0	0	0	0	0	Nil		
Subtotal	280,486	320,713	267,643	238,818	262,700	301,695			
2100 Health Supportive Services									
School Nurse	31,918	32,550	32,878	32,805	33,461	34,129	Inflation rate: 2% per annum.		
Other Health Support	732	2,050	999	1,912	1,841	1,715	Flat @ average of \$1,700.	1,617	1,665
Subtotal	32,650	34,600	33,877	34,717	35,302	35,844			
2220 Media & Computer Services									
Media Specialist	15,967	10,148	16,793	16,921	17,091	17,176	Colebrook teachers' contract: steps + 1% GWI annually.		
Computer/Technology Support	2,850	2,850	223	0	65	0	Flat @ average of \$750	785	455
Library Books, Periodicals & Software	5,421	6,073	6,868	6,007	10,463	9,730	Flat @ average of \$9,000	7,170	8,233
Equipment & Repairs	0	0	0	0	0	0	Nil		
Dues & Fees - Library	0	0	0	0	0	0	Nil		
Subtotal	24,238	19,071	23,884	22,928	27,619	26,906			
2310 Board of Education									
	5,080	9,415	9,929	7,141	6,180	7,450	Flat @ average of \$7,550	7,546	7,517
2320 Superintendent's Office									
Superintendent	47,500	51,000	47,452	52,500	52,500	53,550	Inflation rate: 2% per annum.		
Fiscal & Payroll Staff	28,642	29,749	30,053	30,946	31,648	32,288	Inflation rate: 2% per annum.		
Other Superintendent	3,938	4,316	5,934	4,526	5,671	5,050	Flat @ average of \$5,100	4,891	5,102
Subtotal	80,080	85,065	83,439	87,972	89,819	90,888			

2400 Support Services - Administration

Principal	88,813	91,500	93,879	97,353	99,300	101,782	Inflation rate: 2% per annum.		
Secretary & Head Teacher	35,918	36,600	37,101	43,053	43,853	43,672	Inflation rate: 2% per annum.		
Other Administrative Support	2,300	2,644	3,565	3,518	3,544	11,050	Flat @ average of \$6,000	3,318	5,542
Subtotal	127,031	130,744	134,545	143,924	146,697	156,504			

2600 Operations & Maintenance

Custodial Staff	41,859	42,911	44,538	37,183	36,391	41,423	Inflation rate: 2% per annum.		
Overtime & Summer Help	417	352	315	841	3,475	750	Flat @ average of \$750 per annum.	590	1,300
Service Contracts & Supplies	12,725	8,205	12,375	14,641	15,614	12,355	Inflation rate: 2% per annum.		
Water	4,077	3,786	5,111	8,980	5,472	8,300	Flat @ average of \$6,000	5,740	6,669
Electricity	19,013	17,531	16,180	16,564	14,940	20,000	Inflate 2013-14 @1% per annum.		
Heating Oil	29,241	19,103	29,898	32,655	39,055	39,600	Inflate 2013-14 @1% per annum.		
Building Repairs & Improvements	11,922	12,256	14,039	8,791	16,110	14,210	Flat @ average of \$14,500	13,107	13,311
Equipment & Repairs	4,278	6,773	8,197	19,368	17,451	6,615	Flat @ average of \$10,500	9,759	11,754
Subtotal	123,531	110,915	130,651	139,023	148,506	143,253			

2700 Student Transportation

Regular Transportation	77,302	77,302	75,770	78,135	80,051	83,353	Inflate 2013-14 @ 1% per annum.		
Special Ed Transportation	36,732	17,971	17,641	18,512	24,052	24,361	Flat @ average of \$24,000	21,224	22,194
Subtotal	114,034	95,273	93,411	96,647	104,103	107,714			

2800 Employer Provided Benefits

Medicare & Social Security	26,707	30,423	34,035	34,877	37,510	38,440	3.5% of certified + non-certified salaries.		
Life & Disability Insurance	2,422	2,337	2,160	2,658	2,414	2,660	Flat @ average of \$2,600	2,458	2,488
Health & Dental Insurance	147,790	171,583	172,169	177,274	158,290	187,530	16.0% of certified + non-certified salaries.		
Non-Certified Retirement Plan	3,545	3,615	23,709	36,031	17,015	11,868	7.0% of non-certified salaries.		
Unemployment, TRB & ERIP	0	13,962	425	0	0	150	Flat @ average of \$500		
Subtotal	180,463	221,921	232,498	250,840	215,229	240,648			

All Other	1,128	0	0	0	0	0	Nil		
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Total School Budget	1,740,299	1,770,895	1,767,102	1,720,208	1,759,904	1,871,786			
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**Norfolk/Colebrook School Study Committee
Enrollment Projections**

Norfolk/Colebrook Combined

Year	Births		Grade Level Enrollment								K-6 (excl PreK)	
	Year	Number	PreK	K	1	2	3	4	5	6	Enrolled	Teachers
2004-05	1999	38	11	35	30	35	45	42	30	43	260	
2005-06	2000	32	23	27	40	34	34	48	41	27	251	
2006-07	2001	29	17	42	30	40	39	33	51	43	278	
2007-08	2002	25	8	32	41	34	43	37	38	53	278	
2008-09	2003	21	10	27	27	44	34	45	38	45	260	
2009-10	2004	32	16	30	24	28	47	31	42	38	240	
2010-11	2005	22	18	29	27	28	28	47	30	39	228	
2011-12	2006	21	11	28	23	30	26	26	45	28	206	
2012-13	2007	29	8	32	28	22	32	27	26	45	212	14
2013-14	2008	15	14	26	29	29	22	32	29	30	197	14
2014-15	2009	21	13	26	22	29	29	24	34	29	193	14
Projected												
2015-16	2009	22	13	24	25	22	30	31	25	36	193	14
2016-17	2010	12	13	20	23	25	23	31	33	27	182	14
2017-18	2011	14	13	21	19	23	26	25	33	35	182	14
2018-19	2012	19	13	23	20	19	24	27	27	35	175	13
2019-20	2013	11	13	18	21	20	19	26	28	29	161	11
2020-21	2014	18	13	26	17	21	21	20	27	30	162	11
2021-22	2015	16	13	24	24	17	21	22	20	29	157	11
2022-23	2016	17	13	25	22	24	17	23	23	22	156	11
2023-24	2017	17	13	24	23	22	25	18	24	25	161	11
2024-25	2018	17	13	24	22	23	23	26	18	26	162	11

- Notes: 1. Yellow highlight indicates single section based on recommended class size.
 2. Orange highlight indicates single section in forecast, even though guideline for class size is exceeded.
 3. Recommended class size: K-1 = 18; 2-3 = 22; 4-6 = 24.

Source: Peter M. Prowda, March 18, 2015

Norfolk												
Births			Grade Level Enrollment								K-6 (excl PreK)	
Year	Year	Number	PreK	K	1	2	3	4	5	6	Enrolled	Teachers
2012-13	2007	15	8	16	17	10	15	12	14	24	108	7
2013-14	2008	9	13	14	15	17	9	17	12	15	99	7
2014-15	2009	13	13	12	12	15	17	12	20	14	102	7
Projected												
2015-16	2010	10	13	12	11	11	15	20	12	21	102	7
2016-17	2011	7	13	11	11	10	11	18	21	13	95	7
2017-18	2012	7	13	11	10	10	10	14	19	22	96	7
2018-19	2013	13	13	14	10	9	10	13	15	20	91	7
2019-20	2014	6	13	10	12	9	9	13	13	16	82	7
2020-21	2015	9	13	13	9	11	9	11	13	14	80	7
2021-22	2016	9	13	13	11	9	11	11	11	14	80	7
2022-23	2017	9	13	13	11	10	9	14	11	12	80	7
2023-24	2018	9	13	13	11	10	10	11	15	12	82	7
2024-25	2019	9	13	13	11	10	10	13	11	16	84	7

Colebrook												
Births			Grade Level Enrollment								K-6 (excl PreK)	
Year	Year	Number	PreK	K	1	2	3	4	5	6	Enrolled	Teachers
2012-13	2007	14	0	16	11	12	17	15	12	21	104	7
2013-14	2008	6	1	12	14	12	13	15	17	15	98	7
2014-15	2009	8	0	14	10	14	12	12	14	15	91	7
Projected												
2015-16	2010	12	0	12	14	11	15	11	13	15	91	7
2016-17	2011	5	0	9	12	15	12	13	12	14	87	7
2017-18	2012	7	0	10	9	13	16	11	14	13	86	7
2018-19	2013	6	0	9	10	10	14	14	12	15	84	7
2019-20	2014	5	0	8	9	11	10	13	15	13	79	7
2020-21	2015	9	0	13	8	10	12	9	14	16	82	7
2021-22	2016	7	0	11	13	8	10	11	9	15	77	7
2022-23	2017	8	0	12	11	14	8	9	12	10	76	7
2023-24	2018	8	0	11	12	12	15	7	9	13	79	7
2024-25	2019	8	0	11	11	13	13	13	7	10	78	7

**Norfolk/Colebrook School Study Committee
Enrollment Projections**

Norfolk/Colebrook Combined

Year	Births		Grade Level Enrollment								K-6 (excl PreK)	
	Year	Number	PreK	K	1	2	3	4	5	6	Enrolled	Teachers
2004-05	1999	38	11	35	30	35	45	42	30	43	260	
2005-06	2000	32	23	27	40	34	34	48	41	27	251	
2006-07	2001	29	17	42	30	40	39	33	51	43	278	
2007-08	2002	25	8	32	41	34	43	37	38	53	278	
2008-09	2003	21	10	27	27	44	34	45	38	45	260	
2009-10	2004	32	16	30	24	28	47	31	42	38	240	
2010-11	2005	22	18	29	27	28	28	47	30	39	228	
2011-12	2006	21	11	28	23	30	26	26	45	28	206	
2012-13	2007	29	8	32	28	22	32	27	26	45	212	14
2013-14	2008	15	14	26	29	29	22	32	29	30	197	14
2014-15	2009	21	13	26	22	29	29	24	34	29	193	14
Projected												
2015-16	2009	22	13	24	25	22	30	31	25	36	193	12
2016-17	2010	12	13	20	23	25	23	31	33	27	182	12
2017-18	2011	14	13	21	19	23	26	25	33	35	182	11
2018-19	2012	19	13	23	20	19	24	27	27	35	175	11
2019-20	2013	11	13	18	21	20	19	26	28	29	161	10
2020-21	2014	18	13	26	17	21	21	20	27	30	162	10
2021-22	2015	16	13	24	24	17	21	22	20	29	157	10
2022-23	2016	17	13	25	22	24	17	23	23	22	156	9
2023-24	2017	17	13	24	23	22	25	18	24	25	161	10
2024-25	2018	17	13	24	22	23	23	26	18	26	162	9

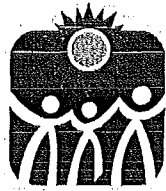
Notes: 1. Yellow highlight indicates single section based on recommended class size.
2. Recommended class size: K-1 = 20; 2-3 = 24; 4-6 = 26.

Source: Peter M. Prowda, March 18, 2015

Norfolk

Births			Grade Level Enrollment								K-6 (excl PreK)	
Year	Year	Number	PreK	K	1	2	3	4	5	6	Enrolled	Teachers
2012-13	2007	15	8	16	17	10	15	12	14	24	108	7
2013-14	2008	9	13	14	15	17	9	17	12	15	99	7
2014-15	2009	13	13	12	12	15	17	12	20	14	102	7
Projected												
2015-16	2010	10	13	12	11	11	15	20	12	21	102	7
2016-17	2011	7	13	11	11	10	11	18	21	13	95	7
2017-18	2012	7	13	11	10	10	10	14	19	22	96	7
2018-19	2013	13	13	14	10	9	10	13	15	20	91	7
2019-20	2014	6	13	10	12	9	9	13	13	16	82	7
2020-21	2015	9	13	13	9	11	9	11	13	14	80	7
2021-22	2016	9	13	13	11	9	11	11	11	14	80	7
2022-23	2017	9	13	13	11	10	9	14	11	12	80	7
2023-24	2018	9	13	13	11	10	10	11	15	12	82	7
2024-25	2019	9	13	13	11	10	10	13	11	16	84	7

Births			Grade Level Enrollment								K-6 (excl PreK)	
Year	Year	Number	PreK	K	1	2	3	4	5	6	Enrolled	Teachers
2012-13	2007	14	0	16	11	12	17	15	12	21	104	7
2013-14	2008	6	1	12	14	12	13	15	17	15	98	7
2014-15	2009	8	0	14	10	14	12	12	14	15	91	7
Projected												
2015-16	2010	12	0	12	14	11	15	11	13	15	91	7
2016-17	2011	5	0	9	12	15	12	13	12	14	87	7
2017-18	2012	7	0	10	9	13	16	11	14	13	86	7
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2019-20	2014	5	0	8	9	11	10	13	15	13	79	7
2020-21	2015	9	0	13	8	10	12	9	14	16	82	7
2021-22	2016	7	0	11	13	8	10	11	9	15	77	7
2022-23	2017	8	0	12	11	14	8	9	12	10	76	7
2023-24	2018	8	0	11	12	12	15	7	9	13	79	7
2024-25	2019	8	0	11	11	13	13	13	7	10	78	7



EDUCATION CONNECTION

Norfolk and
Colebrook
Public Schools

Proposed
Regionalization
Plan

A Report of the Findings and
Recommendations
Of the Regionalization
Study Committee for the
Connecticut State
Board of Education

May, 2015

Norfolk and Colebrook Regionalization Plan

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- Relevant Connecticut Statutes -

§ 10-43. Reports to towns. Dissolution of committee

(a) The committee shall, at least semiannually, make progress reports to the participating towns and the State Board of Education in such manner as the committee deems suitable. Upon completion of its study, the committee shall present a written report of its findings and recommendations to the State Board of Education and the town clerk of each participating town. If the committee finds that establishment of the proposed regional school district is inadvisable, its report shall include such findings and an explanation of the reasons for its conclusions. **If the findings of the committee support the feasibility and desirability of establishing a regional school district, its report shall contain (1) the findings of the committee with respect to the advisability of establishing a regional school district, (2) the towns to be included, (3) the grade levels for which educational programs are to be provided, (4) detailed educational and budget plans for at least a five-year period including projections of enrollments, staff needs and deployment and a description of all programs and supportive services planned for the proposed regional school district, (5) the facilities recommended, (6) estimates of the cost of land and facilities, (7) a recommendation concerning the capital contribution of each participating town based on appraisals or a negotiated valuation of existing land and facilities owned and used by each town for public elementary and secondary education which the committee recommends be acquired for use by the proposed regional school district, together with a plan for the transfer of such land and facilities, (8) a recommendation concerning the size of the board of education to serve the proposed regional school district and the representation of each town thereon, and (9) such other matters as the committee deems pertinent.** The capital contribution of each participating town shall be in the same proportion to the total purchase price or negotiated value of the property transferred as the number of pupils in average daily membership of such town as defined in section 10-261 for the school year preceding that in which the plan is approved by the State Board of Education bears to the total number of such pupils in the participating towns.

§ 10-45. Referendum on establishment of regional districts or addition or withdrawal of grades

(a) Upon receipt of a copy of the certificate of approval, the committee shall set the day on which referenda shall be held simultaneously in each of the participating towns to determine whether a regional school district shall be established as recommended. Such referenda shall be held between forty-five and ninety days from the date of such approval. In the case of a recommendation from a study committee or a regional board of education to add or withdraw grades from the regional school district pursuant to the provisions of subsection (a) of section 10-47b, such referenda shall be held between forty-five and ninety days from the date of such recommendation. The committee or regional board of education shall immediately notify the town clerk in each participating town of its decision. Upon receipt of such notice, the town clerk shall file the notice required by section 9-369a. The warning of such referenda shall be published, the vote taken and the results thereof canvassed and declared in the same manner as is provided for the election of officers of a town. The town clerk of each participating town shall certify the results of the referendum to the State Board of Education.

(b) The vote on the question shall be taken by a "yes" and "no" vote on the voting tabulator and the designation of the question on the voting tabulator ballot shall be "Shall a regional school district be established in accordance with the plan approved by the State Board of Education on (date)?" and the ballot used shall conform with the provisions of section 9-250. If the majority of the votes in each of the participating towns is affirmative, a regional school district composed of such towns is established and shall be numbered in accordance with the order of the incorporation of the districts.

(c) If the majority vote of one or more of such towns is negative, the committee or, in the case of a study committee's or a regional board of education's recommendation to add or withdraw grades from the regional school district pursuant to the provisions of subsection (a) of section 10-47b, the regional board of education shall determine the advisability of immediately submitting the question to referendum a second time. If the committee or regional board of education so recommends, the committee or board shall notify the town clerk in each participating town of its decision. Within thirty days after receipt of such notice, the legislative body of the town shall meet to act upon the committee or board recommendation. If the legislative body in each of the participating towns accepts the recommendation, a second referendum shall be held in each participating town in accordance with the provisions of this section. If the majority of votes cast in each town is affirmative, the regional school district is established and numbered accordingly or grades are added to or withdrawn from the regional school district, as applicable.

DRAFT

- Recommendations at a Glance -

Plan Component	Recommendations
Education	<ul style="list-style-type: none"> • Create a regional Pre-K through grade 6 program. • Use a schedule that creates more instructional time in a module schedule allows for increased exposure to arts education and world languages. • Use a schedule that creates more focused time in language arts and mathematics. • Provide more choices and greater flexibility with class assignments and schedule. • Ensure better alignment with new standards and digital learning expectations in preparation for middle school instruction
Governance	<ul style="list-style-type: none"> • Shared governance with weighted representation based on town population on the new regional Board • Six member quorum with significant cross-over vote requirements
Facilities/ Transportation	<ul style="list-style-type: none"> • Use the Botelle School facility • Norfolk retains ownership of building with a lease arrangement to new district • Both communities share in ongoing capital expenses • Maintain current bus-time guidelines
Finances	<ul style="list-style-type: none"> • Create a formula that allow both communities to save money from the first year of the new district • Projected savings over 10 years of \$2.6 million for each community.

Planning Process Overview

Over the past twenty years, three major trends have combined to put tremendous pressure on school governance and finance structures, structures that were conceived and built in simpler times. First is the shift among all public schools from a universal access educational model – where children make choices to pursue academic or non-academic pathways - to one dominated by the goal of universal proficiency – holding all children to high levels of academic performance measured through annual state-wide testing. With this first change comes strict accountability for all students and adults to an ever growing number of externally imposed mandates and increasingly challenging academic standards. This has created supervision and instructional challenges that require resources and change on a level very difficult to manage on a small scale.

Secondly, the costs of the labor, materials, and expenses required to staff and run a public school have increased faster than the rate of inflation over this same time period. This has created significant funding pressures with education becoming the single largest factor determining increasing taxes and town budgets.

Finally, there has been a slow but consistent decline in student enrollment with no future promise of change which has dropped the number of students in Connecticut districts to levels not seen since the end of World War II. The combined impact of these trends is an ever rising per-pupil expense coupled with challenges of small scale schooling that make it increasingly difficult for any number of Connecticut communities to maintain a consistently high quality academic program. Norfolk and Colebrook are perfect examples of all of these trends. Especially now that both Norfolk and Colebrook have confirmed rapidly declining enrollments, these concerns have led the communities to begin a serious study of these issues and to explore what potential solutions might make the most sense for both of the towns involved.

While these discussions have been going on informally for years, the momentum for a more structured process and a serious study of possible options got underway at the end of the 2011-2012 school year. Both the Norfolk and Colebrook Boards of Education had addressed the possibility on their own agendas. The Superintendents of the districts were talking administratively and in June of 2012 the local Boards of Selectman and Finance joined the conversation. As a result, a joint committee with representatives of both towns and from all three voting bodies- selectman, education and finance, came together to explore all of the facts and

ultimately make a recommendation for action back to their respective Boards and communities. That group worked for six months and recommended that a formal regionalization study committee be formed. A referendum was held in December of 2012, and both communities passed the measure and the legislative bodies set about to secure volunteers to serve on the joint Regionalization Study Committee. The following individuals were nominated and accepted these roles on behalf of their respective communities or organizations:

Voting Members

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wbrodnitzki@comcast.net

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Sally L. Carr, Vice Chair
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Susan M. Dyer, Secretary
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Non-voting members:

CSDE Consultant

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School Superintendents

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Town Clerks

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Linda S. Perkins
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Once the Regionalization Study Committee was formed, an RFP for facilitation of the regionalization planning process was issued. Two different vendors replied to the RFP for facilitation services and interviews were held and proposals reviewed by the full Committee on the night of Wednesday, May 29, 2013. Following the interviews and a brief debate, the Committee voted unanimously to approve the bid of the following vendor:

Jonathan P. Costa, Sr.
EDUCATION CONNECTION
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costa@educationconnection.org

At the first organizational meeting of the Regionalization Study Committee, a work plan was established that organized the tasks required of the Committee by state statute and designated them to be completed by four sub-committees. The four Sub-Committee work-plan structure broke the work into the following areas: **A. Education and Community, B. Facilities & Transportation, C. Governance and Legal, D. Budgets and Fiscal** and identified each group's key tasks.

A. Education and Community Committee

- Grade levels included
- Proposed educational program
- Class size recommendations and configurations and associated staffing plan
- Processes and procedures for naming the new regional elementary school district
- Processes and procedures for the smooth transition to a single regional elementary school
- Development of a communications plan for disseminating the final product to the two impacted communities

B. Facilities & Transportation Sub-Committee

- Facilities recommended and any enhancements or changes that might need to be undertaken to complete the transition (architect assistance required) based on the proposed educational program and requirements
- Estimates of the cost of land and facilities including future needs for renovation/expansion of district elementary schools based on the proposed educational program and requirements

C. Governance and Legal Sub-Committee

- Recommendation concerning the size/representation of the proposed regional board of education
- Processes and procedures for addressing existing and new collective bargaining agreements
- Recommendation concerning the capital contribution of each participating town based on statutory factors

D. Budgets and Fiscal Sub-Committee

- Detailed educational and budget plans for at least a five-year period, including projections of enrollment, staff needs and deployment, transportation and special education needs, and a description of all programs and supportive service plans for the proposed district

The Regionalization Study Committee's first decision within this work plan was to make the Educational Plan work the responsibility of the entire committee. Working as a Committee of the Whole, the group spent its first three months developing and approving the educational plan for the proposed Regional School District. The complete outline of their recommendations for a potential program is contained in the Appendix and is designed as a guide for the potential new Regional Board. For the purposes of the referendum to approve a new regional district, the framework that will bind the new board occupies the next section of this report and starts on page 8. With the educational outline set, the Committee broke into three work groups to complete the remaining tasks. These groups, led by Sherri Gray (Facilities and Transportation), James Millar (Budgets and Fiscal) and Julie Scharnberg (a community volunteer who ably led the Governance and Legal Sub-Committee) set about their tasks. These groups met individually in-between the large group meetings, regularly reporting back to the entire Committee, and submitting and having their reports all approved by the Regionalization Study Committee before the end of the regularly scheduled April meeting. All of their reports address the issues required by statute and are included in this summary report. Additional supporting data are included in the Resource Appendix.

This plan has been presented to both the communities of Norfolk and Colebrook at public informational meetings and will be submitted for approval to the Connecticut State Board of Education and the Commissioner of Education for approval in the spring of 2015. Once State Board approval is granted, a referendum will be scheduled to ask each community for final approval of the plan.

The Educational Plan

Findings: Over three months of work, the Education Committee found the following:

- Norfolk and Colebrook both have effective educational programs creating similar outcomes for students in their respective communities.
- There is a high degree of alignment between the two district's current educational programming
- Decreasing enrollment places significant pressures on the educational resources and programming.
- Merging the educational programs provides opportunities for sustaining and in some cases improving the educational quality available to students in both communities while at the same time providing opportunities for resource efficiencies.

Recommendations:

- The Regionalization Study Committee finds it advisable to establish a regional school district. Once formed through a combination of the Colebrook and Norfolk programs, the new regional district will continue most of the elements that are currently available to both individual schools reformatted in a new framework that makes appropriate use of the new class size and instructional resources that will be created by a merger of these two school districts. Once a new regional board is created, the implementation of this program will be their responsibility, to make the decisions required to fill in the details, and it is important for members of the Norfolk and Colebrook communities to recognize that this new representative regional board will have the ultimate responsibility and accountability for making the specific educational programming decisions for this newly formed district. That board will have the ability to make judgments and decisions based on their collective wisdom and experience and the best available information that they have at the time.

- To guide the new board, this regionalization plan recommends the following general educational principles be adopted. First, that a new regional elementary school that combines the Norfolk and Colebrook Public Schools be formed and that it be housed in the current Botelle School in Norfolk (more on this in the Facilities section of this report). As described in the 2012 study report for the potential consolidation of Norfolk and Colebrook, there are enhancements to the quality of the educational/social experiences of students and teachers that will be realized simply by joining the two programs and increasing the size of the population. Increases in resources and flexibility gains made by doubling the scale of two small academic programs will allow for more choice in the potential assignments that most students might receive for a grade-level teacher.
- The group recommends a daily allocation of 7 instructional hours and suggests, at least initially, that a modular approach (15 minute blocks) that allowed for maximum flexibility to adjust and shift according to needs was the preferred structure. Additionally, there was a consensus that one rotation for Pre-K to 2 and another for grades 3 to 6 would allow for developmental differences to be accommodated. As with all elementary programs, the suggestion is that the day be built around long blocks of time for language arts and math with a greater emphasis on science than in current programming. Social studies will continue to have some dedicated time, but will see more of its content integrated into language arts time as is appropriate with the new Common Core Standards and the focus on close reading of informational text.
- As stated earlier, this potential schedule is designed to allow for large blocks of time for Language Arts and Mathematics with the importance of science instruction at the lower elementary level elevated over the current program in either Colebrook or Norfolk. The integration of Common Core skills allows for direct instructional time and application time in all content areas. The schedule was constructed in 15 minute increments. This allows for flexibility if needed throughout the year or for specific occasions on specific days even or weeks at a time if needed.
- The recommended starting schedule for the new school is centered around the Language Arts and Mathematics blocks which are the cornerstones of an elementary schedule. The Language Arts block (or blocks if divided into two segments) consists of Reader's Workshop and Writer's Workshop. It is inclusive of grammar, word work and spelling. Writing is its own time block and is also heavily integrated into Science and other content areas. Science is divided into two

blocks per week consisting of extended lab time for experiments using the inquiry method, and one block for writing up the lab and preparing for the next area of inquiry.

- In addition, the schedule allows there to be one hour per week dedicated to Science in Language Arts. Since Social Studies at this time is not a tested area and the frameworks are not yet updated, the Social Studies time remains the same as previous but because of the 15 minute increments in the schedule can be easily changed to accommodate specific projects or needs. Specials include Art, Music, Digital Learning, Physical Education/Health, World Language and Developmental Guidance. In each of these areas, there are state frameworks to guide practice. Flex time is given each week to support learners who need challenges and learners who need assistance. This approach provides for the development of a well-rounded elementary student.

Summary of Key Features of the initial recommended K-3 schedule:

Core Academics:

- Language Arts time includes 1 ½ hours for Reader's Workshop and 1 hour for Writer's Workshop which can be one full block or broken into Reader's and Writer's blocks. This is 10 hours less than present but with the additional of the integrated writing time in Science and across all content areas is more effectively used.
- Math will meet 1 ¼ hours per day for an increase of 19 hours per year.
- Science will meet twice per week for an increase of 14+ hours per year. This includes a lab time for actual experiments and separate time to write up the lab with hypothesis, discussion, results, and planning for the next inquiry lesson. This also includes flexible time for Social Studies or Science one time per week depending on the unit of inquiry (See asterisk in schedule). In addition, there will be one hour per week of Language Arts time devoted specifically to Science and ½ hour per week of Language Arts time devoted to Social Studies.
- Dedicated time to Social Studies remains the same as in the current program.

Specials areas:

- Music will meet twice per week for an increase of 15 hours per year.
- PE/Health will meet twice per week for increase of 4 hours per year.

- Digital Learning will meet twice per week for an increase of 13 hours per year. Information and Technology Literacy Framework to be used to incorporate library and technology skills using 21st century skills that are necessary across all areas of schooling.
- World Language will meet twice per week for an increase of 5 hours per year.
- Art will meet once per week for one hour for an increase of 13 hours per year.
- Developmental Guidance is an addition to the present schedule. This is an increase of 10 hours per year meeting every other week to work on social skills. The off week can be used for additional flex time.

Support time:

- Flex time will provide an additional 30+ hours per year for students incorporated into the school week for review, extra assistance and challenge activities.

Other considerations:

- School day is from 8:30-3:30. The first 10-15 minutes and the last 10-15 minutes of each day are for student entry, preparation for the day and for dismissal.
- Assumption of all-day Kindergarten.
- Can be a static schedule or rotating schedule. If rotating, can rotate AM block and PM block— ex. Monday--LA/AM and Math, specials/PM; Tuesday—Math, specials/AM and LA/PM.
- If rotating, specials are clustered at the middle of the LA/AM day, and beginning of the day in the Math specials/AM day. This means a schedule change each rotation day for specialists. Ex. If rotation is Monday LA/AM then Tuesday LA/PM, specialists will be middle of day on Monday and beginning of day on Tuesday. See sample schedule for further clarification.
- Two or three lunch waves depending on static schedule or rotating with a 25 minute lunch and a 25 minute recess per day.

Comparison Summary of Key Features of the K-3 schedule:

Content Area	Hours per year from SSP Grade 2	Future possibilities Grade 2 Static Schedule
LA	510	500
Math	231	250
Science	40	54+

Social Studies	36	36
Music	25	40
PE/Health	36	40
Digital Learning	27	40
World Language	35	40
Art	27	40
Developmental Guidance	-	10
Flex	-	30
Lunch/Recess	-	180

SAMPLE Grade Two Schedule:

GRADE TWO	Monday	Tuesday	Wednesday	Thursday	Friday
8:45 - 9:00	LA	LA	LA	LA	LA
9:00 - 9:15	LA	LA	LA	LA	LA
9:15 - 9:30	LA	LA	LA	LA	LA
9:30 - 9:45	LA	LA	LA	LA	LA
9:45 - 10:00	LA	LA	LA	LA	LA
10:00-10:15	LA	LA	LA	LA	LA
10:15-10:30	LA	LA	LA	LA	LA
10:30-10:45	LA	LA	LA	LA	LA
10:45-11:00	LA	LA	LA	LA	LA
11:00-11:15	LA	LA	LA	LA	LA
11:15-11:30	MUSIC	PE	MUSIC	PE	ART
11:30-11:45	MUSIC	PE	MUSIC	PE	ART
11:45-12:00	DEV. GUID.	SS	FLEX	SCI	ART
12:00-12:15	DEV. GUID.	SS	FLEX	SCI	ART
12:15-12:30		SS	FLEX	SCI	*SCI/SS
12:30-12:45	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess
12:45- 1:00	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess
1:00 - 1:15	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess
1:15 - 1:30	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess
1:30 - 1:45	MATH	MATH	MATH	MATH	MATH

1:45 - 2:00	MATH	MATH	MATH	MATH	MATH
2:00 - 2:15	MATH	MATH	MATH	MATH	MATH
2:15 - 2:30	MATH	MATH	MATH	MATH	MATH
2:30 - 2:45	MATH	MATH	MATH	MATH	MATH
2:45 - 3:00	W.L.	W.L.	SCI	DIG. LEARN.	DIG. LEARN.
3:00 - 3:15	W.L.	W.L.	SCI	DIG. LEARN.	DIG. LEARN.

Key Features of the recommended 4-6 schedule:

Core Academics:

- Language Arts time includes 1 ½ hours for Reader’s Workshop and 1 hour for Writer’s Workshop which can be one full block or broken into Reader’s and Writer’s blocks. This is an increase of 70 hours per year plus the additional of the integrated writing time in Science and across all content areas.
- Math will meet 1 ¼ hours per day for an increase of 56 hours per year.
- Once an additional classroom becomes available with declining enrollment, the regional board will have an option to retain the teacher that would be lost and integrate that position as a fully dedicated science teacher. This would allow science to always be taught by the same teacher with the increased efficiencies and expertise that this would allow. When this happens, science will meet twice per week for one hour for lab time for actual experiments and ½ hour for write up with hypothesis, discussion, results, and planning the next area of inquiry. This is also includes flexible time for Social Studies or Science one time per week depending on the unit of inquiry (See asterisk in schedule). In addition, there will be one hour per week of Language Arts time devoted specifically to Science (dedicated science time is 70 hours per week which is an increase over the K-3 allocation but shows as 18 hours less than current year – there is a question regarding how the SPP science and social studies time are calculated – it is possible that the actual science time is actually an increase over current practice).
- Social Studies is decreased from 89 to 40 hours per year plus integration into the Language Arts area and ½ hour per week of Language Arts time devoted to Social Studies.

Specials areas:

- Music will meet twice per week for a decrease of 10 hours per year.

- PE/Health will meet twice per week for decrease of 3 hours per year.
- Digital Learning will meet twice per week for an increase of 7 hours per year. Information and Technology Literacy Framework to be used to incorporate library and technology skills using 21st century skills that are necessary across all areas of schooling.
- World Language will meet twice per week for an increase of 3 hours per year.
- Art will meet once per week for one hour for an increase of 11 hours per year.
- Developmental Guidance is an addition to the present schedule. This is an increase of 10 hours per year meeting every other week to work on social skills. The off week can be used for additional flex time.

Support time:

- Flex time will provide an additional 30+ hours per year for students incorporated into the school week for review, extra assistance and challenge activities.

Other considerations:

- School day is from 8:30-3:30. The first 10-15 minutes and the last 10-15 minutes of each day are for student entry, preparation for the day and for dismissal.
- Can be a static schedule or rotating schedule. If rotating, can rotate AM block and PM block— ex. Monday--LA/AM and Math, specials/PM; Tuesday—Math, specials/AM and LA/PM.
- If rotating, specials are clustered at the middle of the LA/AM day, and beginning of the day in the Math specials/AM day. This means a schedule change each rotation day for specialists. Ex. If rotation is Monday LA/AM then Tuesday LA/PM, specialists will be middle of day on Monday and beginning of day on Tuesday. See sample schedule for further clarification.
- Two or three lunch waves depending on static schedule or rotating with a 25 minute lunch and a 25 minute recess per day.
- It is assumed that the new regional district will continue to purchase special education services through the Regional District 7 Shared Services model.

Comparison Summary of Key Features of the 5 schedule:

Content Area	Hours per year From SSP Grade 2	Future possibilities Grade 2 Static Schedule
LA	510	500
Math	231	250
Science	40	54+
Social Studies	36	36
Music	25	40
PE/Health	36	40
Digital Learning	27	40
World Language	35	40
Art	27	40
Developmental Guidance	-	10
Flex	-	30
Lunch/Recess	-	180

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SAMPLE Grade Five Schedule:

Grade Five	Monday	Tuesday	Wednesday	Thursday	Friday
8:45 - 9:00	MATH	MATH	MATH	MATH	MATH
9:00 - 9:15	MATH	MATH	MATH	MATH	MATH
9:15 - 9:30	MATH	MATH	MATH	MATH	MATH
9:30 - 9:45	MATH	MATH	MATH	MATH	MATH
9:45 - 10:00	MATH	MATH	MATH	MATH	MATH
10:00-10:15	LA READ.	LA READ.	LA READ.	LA READ.	LA READ.
10:15-10:30	LA READ.	LA READ.	LA READ.	LA READ.	LA READ.
10:30-10:45	LA READ.	LA READ.	LA READ.	LA READ.	LA READ.
10:45-11:00	LA READ.	LA READ.	LA READ.	LA READ.	LA READ.
11:00-11:15	LA READ.	LA READ.	LA READ.	LA READ.	LA READ.
11:15-11:30	LA READ.	LA READ.	LA READ.	LA READ.	LA READ.
11:30-11:45	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess
11:45-12:00	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess
12:00-12:15	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess
12:15-12:30	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess	Lunch/Recess
12:30-12:45	MUSIC	PE	MUSIC	PE	ART
12:45- 1:00	MUSIC	PE	MUSIC	PE	ART
1:00 - 1:15	SCI	SCI	DIG. LEARN.	DIG. LEARN.	ART
1:15 - 1:30	SCI	SCI	DIG. LEARN.	DIG. LEARN.	ART
1:30 - 1:45	DEV. GUID.	SCI	W.L.	W.L.	FLEX
1:45 - 2:00	DEV. GUID.	SCI	W.L.	W.L.	FLEX
2:00 - 2:15	SS	*SCI/SS	SS	SS	FLEX
2:15 - 2:30	LA WRITING	LA WRITING	LA WRITING	LA WRITING	LA WRITING
2:30 - 2:45	LA WRITING	LA WRITING	LA WRITING	LA WRITING	LA WRITING
2:45 - 3:00	LA WRITING	LA WRITING	LA WRITING	LA WRITING	LA WRITING
3:00 - 3:15	LA WRITING	LA WRITING	LA WRITING	LA WRITING	LA WRITING

**Full Time Equivalents for Specialist Areas
(for budgeting purposes)**

Content Area	Static Schedule	Rotating Schedule
Digital Learning	.5 or .6	.4 or .5
Science	.8 or .9	.9
World Language	.5 or .6	.4 or .5
PE	.5 or .6	.4 or .5
Art	.5 or .6	.4 or .5
Music	.5 or .6	.4 or .5
Developmental Guidance (alternating weeks)	.2 (teaching only)	.2 (teaching only)

The recommended program will meet all of the current state requirements for elementary education that are currently being addressed through the existing Norfolk and Colebrook educational programs and will adjust like any other public school as those requirements change. It is the belief of the Education Committee that the schedules and time allocations referenced here are important but not substantive as defined in the statute and that the new regional board could decide to adjust these allocations and programs within the Pre-K to 6 structure without requiring an additional referendum in both communities.

Facilities and Transportation

The Facilities Sub Committee was officially formed in November for the purpose of assessing the physical plant of the Botelle School and to study its capability to accommodate the influx of students from Colebrook Elementary School and house the new regional school district. The sub-committee met nine times and used the professional services of architect James Lawler, and Mrs. Leslie Sheldon, Transportation Director of All Star Bus Transportation Company to assist them in their charge.

Findings:

- The Botelle School, located in Norfolk, would be the desired site to host the proposed educational program and its associated administrative supports.
- After a close review of the student enrollment projections provided to both Colebrook and Norfolk by Dr. Peter Prowda (pages 5-6 Resources Appendix) the sub-committee found that the

Botelle School could accommodate both student bodies with only minor renovations and some easy to accomplish accommodations within the school (a map that numbers each identified classroom space can be found on pages 3-4 of the Resources Appendix).

- That if the enrollment figures hold true, a classroom would become available in the near future, thereby allowing a classroom for a supportive program.
- That the current media center could be converted into two regular classroom spaces if they are needed.
- The local Fire Marshall has provided state and local fire code clearance for the large spaces within Botelle i.e.; cafeteria, gym and classrooms for the predicted student capacities.
- The Botelle School was considered to be in excellent condition with no major capital costs needing to be done to meet the new student body.
 - Roof (main building) done in 2001 with a 25 year warranty
 - Roof (gym section) done in 1993 with a 20 year warranty
- There is adequate storage space. The Colebrook School would retain any material, equipment, furniture, etc. not needed at Botelle. In addition storage containers could be used at Botelle if needed for cold storage. Possible location of storage containers in the Skating Rink.
- A contingency plan of having a Pre-K, AM/PM session was agreed to if the Pre-K numbers exceed 20
- The space available in the Botelle Cafeteria is adequate for a school of 200+ students. Equipment seems adequate.
- The auditorium will still be available for regional school assemblies and Norfolk town meetings.
- Pull out programs for music instruction will more than likely take place in this auditorium space.
- The gymnasium and playground are more than adequate for physical education classes and recess.

Recommendations:

- That the Botelle School be the facility to house the proposed new district and recommended educational program.
- That a classroom be provided in the plan for Pre-K students; a program currently not provided for Colebrook residents.

- That all provided special and supportive programs be assigned spaces available by the school administration in order to provide the priority to the classroom teachers.
- If needed, that the current Botelle Media Room (Computer Center) be disassembled and designated as two regular classrooms until such time as this space is planned to be used in a different way, with a new interior wall constructed at an estimated cost of \$25,000.
- The new Board consider adding another freezer to provide additional food storage capacity. Approximate cost of \$2,500.

Security Planning

The state of Connecticut Department of Education (CDOE) requires a School Safety Committee for each school, and a school safety plan to be developed and filed with the department. Consequently whether there is a regional school or not, the Botelle community has looked at the matter of school safety, and will be working with the Safety Committee to meet the CDOE mandate. In a parallel process, the sub-committee met with Architect Lawler and has also looked at how to ensure Botelle School meets the expectation for safety. A major area of concern for both safety plans, Botelle's and the sub-committee is the entrance (vestibule) of the school.

Security Findings:

- The sub-committee found the primary focus of the security plan would be the main entrance vestibule.
- The Botelle vestibule needs to be renovated.
- The CDOE has allocated security grant money, about one-third to help offset local costs.

Security Recommendations:

- The Botelle vestibule renovation is not critical to consolidation of the two schools. It is not something that would prevent students from attending Botelle.
- A number of options have been presented to the Botelle School Safety Committee, and two options have been presented to the Facilities Sub Committee by Mr. Lawler. The options by Mr. Lawler are in the \$200K range, the Botelle plans were less.

- In either case the sub-committee considers any final decision on this matter should be left to the new Regional Board. It simply may come down to how far the committee wishes to go in improving the security at Botelle beyond what is already in place at the school.

Transportation

The sub-committee met with Mrs. Leslie Sheldon of All Star Bus Company to review the issues regarding student bus transportation.

Transportation Findings

- Both existing bus contracts end as of 6/15/15. Contracts for transportation will go out to bid at that time.
- A new regional school would not require more than the seven buses being used in both towns currently but a better per bus price could be negotiated if all routes were combined.
- There is little that can be done to overcome geography. Currently there are students in both towns on a 55 minute run.
- The Whalen Bus Co. will end its school bus service as of June 30, 2015.
- The lower driveway at Botelle would provide the best drop-off and pick up area for the students
- The upper parking lot would be adequate for employee parking.

Transportation Recommendations

- That the new board strive to create transportation schedules that assure that no student will be on the bus longer than the State mandated 60 minutes under normal conditions.
- Current routes in both towns be altered after it is determined where all the students who attend the new district live.
- A more comprehensive computerized bus schedule should be determined once the referendum passes.
- A Pre-K mid-day bus run will be necessary.
- School starting and ending time be pushed back (later) in order to allow longer routes if needed.
- The current policy of picking up students at the end of the driveway or front of the house continue

- Norfolk and Colebrook buses will be garaged in their respective towns.

Governance and Legal

The most important decision of this sub-committee is size and representative nature of the new proposed Regional Board of Education. On matters of contracts, attorney Fred Dorsey from the firm of KAINEN, ESCALERA and MCHALE PC was engaged for guidance.

Findings:

- The group researched all of the existing regional school governance models in an effort to frame the issue for the new Regional Board.
- To ensure that this weighting is not perceived by either community to unfairly create an undue influence in one community over another, the mechanism of cross-over voting can be an effective tool. A cross-over provision requires that in order for certain items to be adopted by the board, there must be a majority vote with at least one member from each town voting in the affirmative.
- Counselor Dorsey advised that: “the Local Boards have no obligation to bargain over the decision to regionalize educational services, but do have impact bargaining obligations should regionalization occur. Many of the impact issues, such as layoff clauses, are already contained in collective bargaining agreements and need not be renegotiated. The responsibility to negotiate will not, however, transfer to the new Regional Board until such time as the Regional Board actually assumes control of the new system and employs the workforce. During the transition, the Local Boards will have to continue to bargain any contracts due for negotiations under the MERA or TNA. Short contracts or contract extensions should be considered for such transitional bargaining, but the importance of wage and health insurance provisions should not be overlooked during these negotiations.”
- The present statutory factors include a requirement to equalize the assets and liabilities that each town contributes to the new region, and assumes that each town will contribute a significant asset, e.g., their town’s school building.

Recommendations:

- That the new regional board should be comprised of four (4) members from the Town of Colebrook and four (4) members from the Town of Norfolk.
- That voting on the board shall be weighted. The weight assigned to each town should be set initially based on the reported population of each town in the 2010 Federal census. Thereafter, the weighting should be reviewed and reset based on the population of each town as reported by subsequent decennial Federal censuses.
- That a cross-over voting provision be employed whenever:
 - There is a hiring decision for a Principal or Superintendent
 - Capital improvements exceeding \$10,000
 - Recommendations for annual budgets
 - Adoption or change of Board by-laws
 - Adoption or change of Board policies
 - Changes or additions to lease or bonding obligations.
- That a quorum for a Board meeting require the presence of no less than six (6) board members in order to transact business.
- That final bylaws of the new regional board should contain an explicit code of ethics. The code of ethics should include, at a minimum, the following principles:
 - *I will be a staunch advocate of high quality free public education for all Connecticut children. In fulfilling my responsibilities, I will think of "children first."*
 - *I will work unremittingly to help my community understand the importance of proper support for public education, whether it be in providing adequate finances, optimum facilities, staffing and resources, or better educational programs for children.*
 - *I will insist that all school business transactions be open and ethical.*
- The newly formed region should lease Botelle School from the Town of Norfolk on a triple net basis for a nominal annual amount. Triple net means that all costs of operating and maintaining

the facility should be borne by the regional board. While not final yet, proposed lease guidelines include:

- Initial Term 5 years
- Escape Clause by Statute
- Rent: \$1.00 annually
- Liability Insurance to be carried by Regional Board of Education and carrier is to be same carrier used by the Town of Norfolk. Current carrier is CIRMA.
- There would be a Capitol Fund Line Item in the budget each year not to exceed 1% of the Board of Education Budget.
- Building Committee to be formed for Capitol and major repairs or renovations the committee will be as follows:
 - Committee to be formed by Board of Selectmen in each town.
 - Committee will consist of six (6) members with four (4) votes needed for approval of any projects. Members will be as follows: two (2) members of the Regional Board of Education, two (2) members from Colebrook and two (2) members from Norfolk. These four (4) members should have knowledge of construction practices.
 - Any recommendation from the Building Committee to be presented and approved by the Regional Board of Education and the Norfolk Board of Selectmen as property owners.
- Given that there would be no transfer of property into the newly formed regional district, there should be no equalization of assets and liabilities, and therefore no capital contribution. However, the Town of Colebrook should underwrite the conversion costs associated with accommodating the additional students, not to exceed \$50,000.
- That the following be used as wording for the proposed referendum:

"Shall a regional school district be established in accordance with the plan approved by the State Board of Education on (date)?"

Yes _____ No _____

Budget and Fiscal

The Fiscal Subcommittee's principal task was to produce a ten year financial forecast for each town and for the pro-forma, combined district. The forecast covers the period from 2015-16 through 2024-25. The subcommittee also considered one-time transition costs. Turning to forecast mechanics, the process began with the 2013-14 budgets approved by each town. Several changes were made to the town budgets to reflect staff changes that occurred after the budgets were approved. The pro-forma budget is derived from the town budgets assuming that all children will attend the Botelle School and that program offerings will follow those laid out in the educational program section of this report. It further assumes the elimination of administrative duplication and certain expenditures that will no longer be necessary, such as utilities for the Colebrook School. Some expenses actually increase in the pro forma budget: for example, higher salaries to equalize pay scales and add staff to the pre-K program. Each of these changes is detailed in the appendices.

The forecast itself uses four types of assumption: (i) teacher salaries assume that the 2013-14 staff remain in place and advance in seniority under the step structure of the current Norfolk contract, which is inflated by 1% a year; (ii) non-certified salary expense is inflated by 2% a year; (iii) benefits are a flat percentage of salaries; and (iv) most other line items are based on historical averages. The enrollment projections made in 2013 by Peter Prowda are also used. Initially, there are two sections of each K-6 grade, but declining enrollment allows some sections to be combined beginning in 2021-22.

A similar process was followed to create an individual forecast for each town based on the assumption that a combination does not occur. Care was taken to use similar assumptions in each of the three forecasts so that the bias inherent in any set of assumptions will affect the two towns and the pro-forma combination as equally as possible.

The actual cost of operating the two schools, whether alone or in combination, will undoubtedly diverge from these forecasts. However, the Subcommittee firmly believes that a combination will offer significantly lower the costs to each town. Almost 50 pages of supporting data projections that serve as the foundation for this budget can be found in the Resources Appendix.

Budget and Fiscal Findings:

- Both towns have similar demographics:

	<u>Norfolk</u>	<u>Colebrook</u>
Population	1,678	1,457
Per Capita Income	\$41,176	\$37,227
Cost Per Student	\$18,243	\$15,393

- K-6 enrollment has declined almost 21% since 2009-10 and is expected to decline another 16% by 2024-25.

	<u>K-6 Enrollment</u>			
	<u>2009-10</u>	<u>2014-15</u>	<u>2019-20</u>	<u>2024-25</u>
Norfolk	126	102	83	81
Colebrook	<u>119</u>	<u>92</u>	<u>83</u>	<u>81</u>
Total	245	194	166	162

- Combining the two schools will save 7.9% in the first year, rising to 14.3% in the tenth year, versus the cost of continuing independently "as is."

	<u>2014-15</u>	<u>2019-20</u>	<u>2024-25</u>
Norfolk "As Is"	\$2,538,243	\$2,786,403	\$2,987,686
Colebrook "As Is"	<u>\$1,859,166</u>	<u>\$2,081,087</u>	<u>\$2,249,823</u>
Total	\$4,397,409	\$4,946,599	\$5,237,509
Pro Forma Combined	\$4,048,575	\$4,170,350	\$4,488,136
Savings vs. "As Is"	\$348,834	\$697,141	\$749,373

- The initial savings of 7.9% appear to violate CGS 10-262i, the minimum budget requirement. Additional violations may occur in 2017-18 and 2019-20 when several grades consolidate from two sections into one, requiring fewer teachers. The amount and timing of such budget reductions will depend upon enrollment.
- If the pro forma budget is allocated by enrollment in accordance with CGS 10-51(b), all of the savings accrue to Norfolk during the first five years. This occurs because Colebrook's initial cost per student is 16% lower than Norfolk's (i.e., twice the initial savings). The situation improves during the second five years.

	<u>Norfolk</u>	<u>Colebrook</u>
Five years 2015-20:		
Average Enrollment Share	50.1%	49.9%
Average Annual Allocation	\$2,101,718	\$2,093,689
Total Savings vs. "As Is"	\$2,938,736	(\$497,483)
Five Years 2020-25:		
Average Enrollment Share	49.9%	50.1%
Average Annual Allocation	\$2,181,086	\$2,186,432
Total Savings vs. "As Is"	\$3,641,986	\$4,368

- With comparable services, the cost of operating the combined district is about 7.7% lower than the cost of operating each school separately. The initial savings assume no reduction in teaching staff and include certain town-provided services in the combined budget – snow plowing, for example – that are not included in the individual budgets.
- The savings increase over time, as declining enrollment permits some grade levels to be combined into a single section. By 2024-25 the savings are 14.6% compared to separate operations.
- The fact that Norfolk’s individual budget is about 38% higher than Colebrook’s presented a challenge, because any allocation of the combined budget based solely on enrollment (the method used by Region 7) would cause Colebrook to pay substantially more under the combined district than it would alone.
- There is likely to be series of transition costs required to support the transition from two districts to one. These costs include such items as moving expense, attorneys’ fees, transition planning, building renovations, and severance packages. Transition costs were difficult to estimate, but will likely be in the range of \$100,000 to \$150,000.

Budget and Fiscal Recommendations:

- To solve the challenge of equalizing the cost per pupil while still allowing both communities to save money, the subcommittee recommends that savings be recalculated on the basis that Colebrook’s share of the combined budget is no higher than its individual budget. These adjusted savings are then divided among the towns based on enrollment. This adjustment is fully applied to the first five years of the forecast; it then tapers to zero in the tenth year. The cumulative savings to each town over the ten year period are about \$2.6 million.
- A more equitable distribution of savings should be achieved by allocating the pro forma budget based on each town’s average share of the “as is” budgets – 57.4% to Norfolk and 42.6% to Colebrook – during the first five years. These allocations are adjusted during each of the second five years to return to an enrollment-based allocation in year 10.

	<u>Norfolk</u>	<u>Colebrook</u>
Five years 2015-20:		
Average “As Is” Share	57.4%	42.6%
Average Annual Allocation	\$2,408,164	\$1,787,244
Total Savings vs. “As Is”	\$1,406,508	\$1,034,745

Five Years 2020-25:

Average Transition Share	52.9%	47.1%
Average Annual Allocation	\$2,309,423	\$2,058,096
Total Savings vs. "As Is"	\$3,000,305	\$646,048

- That a special act of the Connecticut Legislature be submitted that requests a 10 year exemption from CGS 10-242i and CGS 10-51(b) to provide flexibility in the event that the extent or timing of the enrollment decline differs from the current forecast. It also permits a more orderly transition to the enrollment-based allocation during the second five years of the forecast period.

Norfolk/Colebrook Study Committee Summary of Forecast Savings

	1st Year 2015-16	Last Year 2024-25	10 Year Total
1. Town Budgets "As Is"			
Norfolk "As Is"	2,543,893	2,931,209	
Colebrook "As Is"	1,845,758	2,201,069	
Combined "As Is" Budget	4,389,651	5,132,278	
2. Pro Forma Budget			
Norfolk Share	2,056,402	2,191,201	
Colebrook Share	1,994,710	2,191,201	
Total Pro Forma Budget	4,051,112	4,382,402	
3. Pro Forma vs "As Is"			
Norfolk Savings	487,491	740,008	6,541,100
Colebrook Savings	(148,952)	9,868	(655,354)
Total Savings	338,539	749,876	5,885,746
4. Savings Adjustment			
Colebrook Savings	(148,952)	9,868	(655,354)
Adjustment Factor	1.0	0.0	n/a
Savings Adjustment	(148,952)	0	(648,388)
Total Savings	338,539	749,876	5,885,746
Adjusted Savings	189,587	749,876	5,237,358
5. Share of Adjusted Savings			
Norfolk Share	96,237	374,938	2,617,135

Colebrook Share	93,350	374,938	2,620,223
Adjusted Savings	189,587	749,876	5,237,358

Notes:

1. The pro forma forecast includes the cost of town-provided services, but not new programs or pre-existing debt service.
2. The allocations of budget and savings in sections 2 and 5 above are based on projected enrollment.
3. The savings adjustment in section 4 prevents Colebrook from being assessed more than its "as is." budget in the early years. The adjustment factor tapers from 1.0 to 0.0 beginning in 2020-21.

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Transition Planning

Assuming that this report is accepted and the referendum are successful, the Regionalization Planning Committee will be dissolved and, according to statute, a new regional Board will be created within 30 days. It will be that Board's responsibility to implement the recommendations contained in this report. As some of the Planning Committee's members may eventually serve on the new Regional Board, there may be some continuity of knowledge and experience between the two groups. If that does not occur, members of the Planning Committee could certainly serve as a resource to the new Board during the time of transition. Among the tasks anticipated in the transitional period:

- Recruiting volunteers from the schools and community to help with the planning of key transition issues.
- Setting a transitional calendar which includes moving, meeting, and key transition dates.
- Determining naming conventions.
- Scheduling informational and planning meetings.
- Creating a Faculty Transition Committee that would include members of the staff of both current schools to help organize and focus the transition in a way that would reflect the concerns and needs of the professional staff who will be most impacted by this change.

Terms and Definitions

Class size – how many children are assigned to each grade-level teacher for the year in general education instruction.

Common Core State Standards – the globally benchmarked academic standards in language arts and math that the Connecticut State Board of Education endorsed as Connecticut's official academic standards in July of 2010 (joining 43 other states that had done the same). These standards are more rigorous than Connecticut's previous standards and will require extensive curriculum and instruction adjustments to help students achieve proficiency.

Curriculum and instructional alignment – degree to which the materials and teaching used to educate students are focused on the same things from year to year and school to school. With both communities mostly sending students to the same middle and high school, this alignment has an impact on the preparation of students for academics beyond elementary school.

FTE – Full-time employee. For budgeting purposes, the report takes an average predicted cost per employee based on history as a foundation for making estimates on staff costs and/or savings over-time.

ECS impact – Educational Cost Sharing – the degree to which the state of Connecticut will subsidize the per-pupil expense of educating children in your community.

Equality of opportunity – the equality of opportunity for advancement and learning from student to student of the various classroom arrangements that are possible given the combination of enrollment, staff, budget, and facility.

Logistics, management and transportation – the associated costs of doing the educational business (beyond the professional staff) – running the buildings, constructing budgets, making the busses run on time, etc.

Maximum class size – the number of children that each local Board of Education has set as the most it would like to see in any given classroom at any given level. In both communities these numbers are considered recommendations and do not carry the weight of policy or regulation.

MERA - Municipal Employees Relations Act.

Non-tested – all subjects taught that are NOT assessed through a standardized, state-wide test (usually math, writing, and reading are considered tested areas).

Per-pupil expenditure (CSDE adjusted) – the total education budget for the community divided by the number of students served by that same budget, MINUS transportation, bonding, special education outplacement, and certain building costs).

Per-pupil expenditure (raw) – the total education budget for the community divided by the number of students served by that same budget.

Pro Forma – literally means “as a matter of form” and is a term used to say that this is our best prediction based on the historical information we have. If the next five years behaves like the last 5 years, this is what we believe will occur.

Reform Bill 458 (PA12-116)– the educational reform legislation passed in Connecticut in May of 2012 that creates new expectations for testing, teacher evaluation, professional learning, supervisory practices, certification, and a variety of other new educational mandates.

Regionalization – the legal process involving two specific community votes (study/approval) in which two or more communities decide to formally merge the operations of their schools into a wholly new legal entity. This new entity has both governance and fiscal authority in the running of the newly organized school district.

Representation – the degree to which a community has a say in the way its children are educated and its resources are allocated.

Smarter Balance Assessment Consortia – a 36 state consortia that has committed to a new generation of tests that gauge student’s ability to meet the new Common Core State Standards.

Stability and flexibility balance – achieving a balance between the ability to change things so the system is responsive with the need for stability so people can plan for the long-term solutions needed to make the most out of resources and materials.

Specials – for budgetary purposes, the designation of music, art, computer, physical education and world language instruction at the elementary level.

Special education obligations/support services – those educational services that are required and provided to students with special education designations as directed by federal and state law.

Supervisory practices – the way in which the principal is able to oversee and develop the teachers within a school.

Timeline – how long will it take to plan and implement the desired change.

TNA - Teachers Negotiations Act.

Transitional burden – how much effort will be required to transition from the current arrangement in the two towns to whatever arrangement is desired.