

# Long Range Planning

Friday, November 1, 2019

4:45 PM

5.3.2

In attendance Joe Phelan, Tom Burnell, Diane Lyons, Steve Jenkins, and Jaclyn Savolainen

We reviewed the reports from the administrators' 1 ½ day facilitated retreat in August and subsequent meetings to date.

Before the summer, this committee asked Joe for a highly detailed picture of a possible scenario in which the district reorganizes the buildings to be K-6 and 7-12. Although everyone is mindful about what might be lost in such a reorganization, the committee would like to focus on what could be gained and what can be preserved, as we face the reality of substantially declining enrollment and ongoing tax cap limitations on our budget. The full board is expecting a presentation by December with enough district-specific information for the board to consider this option. This should include details about staffing, classrooms, advisors, clubs, daily schedules, athletics, music, and other factors.

The committee discussed this is as an opportunity to come up with a new way to provide for our students and to plan for the future rather than waiting until the smaller class sizes reach the upper grades and rushing solutions in crisis mode. The committee also discussed the possibility of hiring a consultant to develop a detailed restructuring plan for the board's consideration.

Next meeting November 13, 2019

Respectively submitted: Steve Jenkins & Jaclyn Savolainen (revisions)



4.2.2

**Rhinebeck Central School District  
Administrative Retreat - August 28-29, 2019**

**LONG-RANGE PLANNING, OPERATIONS AND REORGANIZATIONS**

**1. OVERALL SHARED OBJECTIVES FOR LONG-RANGE PLANNING**

- A. Continue to improve as a school system
- B. Continue to maintain levels of excellence that the community has come to expect
- C. Anticipate and account for finite fiscal resources and future enrollment patterns
- D. Consider school facility utilization, including future options for engaging appropriate educational or community service partners in rental agreements
- E. Incorporate routine safety and compliance reviews so as to provide both proactive and responsive planning of appropriate systems and fiscal resources
- F. Prepare responsive options for operating and/or reorganizing future school programs and services. Assess and consider potential benefits and impacts.
- G. Explore and consider regional school or district partnerships in order to:
  - 1) Create potential means for extending or offering instructional programs otherwise at risk of under enrollment and potential elimination.
  - 2) Renew and/or reassess the potential application of technology supported delivery systems to engage teachers with learners.
  - 3) Attract highly qualified full-time teaching candidates to split service personnel appointments with responsibilities distributed among two or more districts
  - 4) Provide coordinated split service direction and support for specific programs and/or services shared among two or more districts.
- H. Add value to or improve instructional programs and educational services by:
  - 1) Continuing to incorporate annual implementation plans associated with objectives arising from the approved District CDEP Plan, including its:
    - Mission, Vision and Core Values Statements
    - Long-Term Goals
      - Academic and Achievement
      - School Climate and Social-Emotional Development
      - Professional Development and Collaboration
  - 2) Continuing to incorporate annual action plans based upon having:
    - Measured educational outcomes
    - Assessed the results of current approaches and new initiatives
  - 3) Incorporating plans that address Federal, ESSA or State accountabilities
  - 4) Performing annual reviews that set priorities and establish plans to:
    - Extend appropriate programming across school levels,
    - Increase consistency in implementation, and/or
    - Close gaps in K-12 service delivery
  - 5) Planning annually to serve an ongoing but changing student profile with:
    - Increased needs, including those of social-emotional development
    - Higher proportions of acute needs and requirements for transitional supports
  - 6) Evolving definitions of inclusion and adjusting services as necessary
- I. Develop an annual staff and community communication plan, that:
  - 1) Articulates the district's long-range and multi-year planning process
  - 2) Identifies the year's annual planning objectives and relevant timelines
  - 3) Invites and solicits both staff and community input to support the Board's long range fiscal and program planning processes
  - 4) Celebrates district accomplishments, highlighting program and fiscal developments, enhancements, economies and efficiencies
  - 5) Links celebration communication to strategic accomplishment or fulfillment of objectives represented annually in the District's approved budget, the Board's LRP process and the District's approved CDEP plan
  - 6) Expands the use of technology tools and platforms for disseminating and providing interactive parent/community access to information

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## Long Range Planning, Goals, Objectives and Reflections

### 2. A TIMELINE FRAMEWORK

#### A. THREE MAJOR PHASES

General Principles for Long Range Planning (LRP):

- 1) Select key priorities annually and address them well - "Don't attempt to boil the ocean"
- 2) Engage intentionally in annual scans to identify actionable opportunities for increasing consistency and/or extending and articulating K-12 programming or services
- 3) Evaluate potential actions relative to the district's Mission, Vision and Core Values statements
- 4) Communicate with and engage both internal and external constituencies in the LRP process

IMMEDIATE YEAR	NEAR TERM: NEXT TWO YEARS	LONGER TERM: 3 YEARS OUT AND BEYOND
2019-2020	2020-2021 2021-2022 *	2022-23 2023-24 and beyond
<p><b>KEY OBJECTIVES (Examples):</b></p> <ul style="list-style-type: none"> <li>• Develop and implement Communication Plan</li> <li>• Disseminate LRP process to both staff and the community</li> <li>• Perform annual alignment review and identify priorities for SY 2020-21 with respect to extending programs across grade levels, closing gaps, and increasing consistency of program delivery.</li> <li>• Align SY 2020-21 Budget Process with LRP Process, including:               <ul style="list-style-type: none"> <li>○ Admin Recommendations correlated to each specific LRP Objective (See Page One)</li> <li>○ Correlating annual CDEP Implementation and Summer Curriculum and Training projects with annual LRP objectives</li> <li>○ Admin Recommendations forecast as a 15-Month Strategic Planning Cycle (see table below), including:                   <ul style="list-style-type: none"> <li>✓ Development priorities</li> <li>✓ Projected Implementation and evaluation activities,</li> <li>✓ Projected expenditure requirements</li> <li>✓ Projections for Summer 2020 closure activities for SY 2019-20 and preparation planning for SY 2020-2021</li> </ul> </li> </ul> </li> <li>• Initiate long range planning discussions with potential district partners regarding options for shared program and services delivery commencing in SY 2020-21 and beyond.</li> <li>• Commence consideration of enrollment and facility utilization including implications for options for evolving current patterns of both administrative and educational staff utilization.</li> </ul>	<p><b>KEY OBJECTIVES (Examples):</b></p> <ul style="list-style-type: none"> <li>• Develop and implement annual Communication Plan</li> <li>• Implement identified alignment priorities for SY 2020-21, with specific attention to consistency, gaps, impact and effectiveness.</li> <li>• Perform annual alignment review and identify priorities for SY 2021-2021 with respect to extending programs across grade levels, closing gaps, and increasing consistency of program delivery.</li> <li>• (*) During 2020-21, identify and study potential grade level organization patterns so as to recommend both budget and implementation priorities for school enrollment and school grade patterns for SY 2021-22. Include an analysis of both benefits and impacts of grade/facility reorganization options.</li> <li>• Implement district partnerships in SY 2020-21 and SY 2021-22 in conjunction with budget and program planning cycles.</li> <li>• Continue to align SY 2020-21, SY 2021-22 and SY2022-23 Budget timelines with LRP Process</li> <li>• (*) During 2021-22, implement adopted grade, school and staff reorganization recommendations as incorporated within the SY 2021-22 annual district budget</li> <li>• Utilize the 15-Month Strategic Planning Cycle to develop annual:               <ul style="list-style-type: none"> <li>○ LRP Objectives and implementation timelines</li> <li>○ CDEP development and implementation objectives</li> <li>○ Prioritized assessments and /or reviews of programs</li> <li>○ Plans to address Federal, ESSA and State requirements</li> <li>○ Safety and compliance reviews and audits</li> <li>○ Annual budget considerations and recommendations</li> </ul> </li> </ul>	<p><b>KEY OBJECTIVES (Examples):</b></p> <ul style="list-style-type: none"> <li>• Utilize the 15-Month Strategic Planning Cycle to update annual LRP objectives as needed for SY 2022-23 and SY 2023-24.</li> <li>• Develop and implement annual Communication Plan</li> <li>• Implement identified alignment priorities for SY 2022-23, with specific attention to consistency, gaps, impact and effectiveness.</li> <li>• Perform annual alignment review and identify priorities for SY 2022-2023 with respect to extending programs across grade levels, closing gaps, and increasing consistency of program delivery.</li> <li>• Implement district partnerships in SY 2022-23 conjunction with budget and program planning cycles.</li> <li>• Continue to align SY 2022-23 (and beyond) Budget timelines with LRP Process</li> <li>• Continue to utilize the process of 15-Month strategic planning to develop annual:               <ul style="list-style-type: none"> <li>○ LRP Objectives and implementation timelines</li> <li>○ CDEP development and implementation objectives</li> <li>○ Prioritized assessments and /or reviews of programs</li> <li>○ Plans to address Federal, ESSA and State requirements</li> <li>○ Safety and compliance reviews and audits</li> <li>○ Annual budget considerations and recommendations</li> </ul> </li> </ul>

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**2 A TIMELINE FRAMEWORK (CONTINUED):**

**B. 15 MONTH STRATEGIC PLANNING CYCLE**

SUMMER	SY – Q1	SY – Q2	SY – Q3	SY – Q4	SUMMER
<u>LATE JUNE – AUG.</u> <b>PREPARE AND DEVELOP</b> <ul style="list-style-type: none"> <li>Complete an analysis of results pertaining to the previous school year: i.e. students, operations, CDEP, school and LRP plans</li> <li>Identify fall and projected quarterly actions for the next school year (SY)</li> <li>Complete Planned Curriculum Work and Training Initiatives</li> <li>Facilitate Project Teams</li> <li>BOE Goals</li> <li>Admin. Retreat and Planning</li> </ul>	<u>SEPT-NOVEMBER</u> <b>ORIENT AND ENGAGE</b> <ul style="list-style-type: none"> <li>Orient Staff to Annual SY Focus and LRP Projections</li> <li>Engage with others to initiate New or Updated Programs</li> <li>Provide training as associated with new SY programs and plans</li> <li>Initiate SY action plans</li> <li>Recruit and commence "Communities of Practice" Teams to address annual objectives (short term task force groups)</li> </ul>	<u>DEC – JANUARY</u> <b>ANTICIPATE AND RECOMMEND</b> <ul style="list-style-type: none"> <li>Schools &amp; Administration recommend proposed goals, staffing, projects and budget expenditures for the ensuing Summer and school year</li> </ul> <hr/> <b>ONGOING:</b> <u>Nov. - LATE JAN.</u> <b>COACH &amp; IMPLEMENT</b> <ul style="list-style-type: none"> <li>Provide coaching and feedback for newly implemented and updated programs</li> <li>Continue LRP planning and project</li> </ul>	<u>FEB – MARCH</u> <b>BUDGET FORMULATION</b> <ul style="list-style-type: none"> <li>Consider proposals for next SY Budget</li> <li>Align proposed expenditures with LRP multi-year priorities and objectives</li> </ul> <hr/> <b>ONGOING:</b> <u>LATE JAN. – MARCH</u> <b>OBSERVE AND MONITOR</b> <ul style="list-style-type: none"> <li>Observe annual school and LRP activities</li> <li>Monitor alignment to objectives</li> <li>Provide additional support or intervention as needed</li> </ul>	<b>** MAY **</b> <b>COMMUNITY BUDGET VOTE</b> <hr/> <b>ONGOING:</b> <u>APRIL - JUNE</u> <ul style="list-style-type: none"> <li>Summer Project and Training List Announced</li> <li>Recruit Summer Project Participants</li> <li>Complete annual school and LRP action plans for current SY</li> <li>Collect current SY Data and Evidence: i.e., students, operations, school and LRP action plans</li> </ul>	<u>LATE JUNE – AUG.</u> <b>RENEW, REVISE AND DEVELOP</b> <ul style="list-style-type: none"> <li>Update, Plan &amp; Prepare the next annual cycle of LRP activities for ensuing SY</li> <li>Incorporate these LRP processes in summer BOE and Admin. Meetings.</li> <li>Conduct annual results analysis and complete annual LRP and CDEP summer planning and development activities; e.g., LRP priorities, school/district initiatives, curriculum, training, etc.</li> </ul>
<b>PLAN THEMES, CONTENT &amp; SCHEDULE</b>	<b>IMPLEMENT ANNUAL COMMUNICATIONS PLAN</b> <ul style="list-style-type: none"> <li>Internal Constituencies</li> <li>External Constituencies</li> </ul>			<b>PLAN THEMES, CONTENT &amp; SCHEDULE</b>	

**3. A FRAMEWORK FOR PROGRAM AND PRACTICES REVIEW – TWO SETS OF GUIDING QUESTIONS**

**A. SET ONE**

- 1) What are we doing?
- 2) Why are we doing it?
- 3) How is it connected to other initiatives?
- 4) How are students benefitting?

**B. SET TWO**

Overarching Consideration:

Should a program/practice/system be continued, versus is it sustainable?

- 1) In its same form?
- 2) In a more efficient and economical form?
- 3) In an enhanced or improved form?
- 4) In a different or modified form?

**4. A FRAMEWORK FOR PROPOSAL MAKING**

Overarching Considerations:

To move from our current status to a proposed future status, upon what is a recommendation based?

- Informed by Function (How it is proposed to be accomplished or must be accomplished?)
- Informed by Usage (How it is occurring or needs to occur?)
- Informed by Data or Evidence (What are the current results? What are the desired results?)
- Informed by Associated Training (What knowledge or skills are needed to meet desired goals?)

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**5. OTHER CONSIDERATIONS – RE: CAC-LRP SUMMARY NOTES**

**A. OVERVIEW**

- 1) The Administrative LRP considerations outlined above incorporate multiple district initiatives, programs and operations that were NOT addressed within the CAC-LRP Summaries
- 2) The Administrative LRP considerations outlined above DO address many elements and processes articulated within the CAC-LRP Summary Notes.
- 3) Both the Administrative LRP and CAC-LRP Summary considerations have been integrated above within a common set of LRP Objectives, Timelines, Principles and Frameworks sections.
- 4) Additional Administration consideration of other specific CAC-LRP Summary Notes are discussed further below.

**B. OTHER SPECIFIC ELEMENTS ADDRESSED WITHIN CAC-LRP SUMMARIES**

1) Areas for Potential Innovation

- Create linkages among current K-12 individual student review and planning activities.
  - ✓ Implement new Naviance Career and College Planning Tools: 6-12
  - ✓ Expand the use of and integrate student interest inventories within individual review, development and planning activities
  - ✓ Explore potential for becoming a developmental partner with Naviance in K-5
  - ✓ Communicate with and enable parent use of the new Naviance Parent Portal
- Create specific activities at each school level to develop individual student's capacities for setting and monitoring personal learning goals
  - ✓ Consider the use of "growth mindset" concepts and principles to support students' process of evaluating their own learning
- Create linkages among current approaches and expand the overall K-12 system of individualized career development
  - ✓ Consider appropriate introductory exposure programming in K-5
  - ✓ Consider evolving community service and/or internship options
  - ✓ Articulate options for RHS students, in addition to those offered at CTI
  - ✓ Provide exposure experiences to the skills of developing/operating a small business
- Further develop and articulate K-12 interdisciplinary learning modules and experiences
  - ✓ Insure students are understanding the interdisciplinary nature of current programming
  - ✓ Consider evolving a K-12 scope and sequence of interdisciplinary learning outcomes
- Consider options for developing cross-age or peer based mentoring opportunities

2) Resource Allocation

- The tax cap system creates a context for limited growth in potential district revenues
- Enrollment patterns indicate a potential for 6<sup>th</sup> grade to remain at CLS in 2021-22
- Staffing analyses and future staff utilization should include reviews of potential options among all district employee sectors, not just that of administrators. Examples may include:
  - ✓ Potential reorganized roles and/or responsibilities among administrators
  - ✓ Feasibility of maintaining full-time teaching personnel in all grades and subjects, special subjects or educational service areas
  - ✓ Consideration of options for shared operations and maintenance staffing
- Consider the cost/benefits of engaging district sponsored or shared grant writing services
- Do not engage in the recruiting of out-of-district students as a means of stabilizing or increasing future district enrollment
  - ✓ The equal opportunity access requirements of opening out-of-district enrollment would create legally binding and unknown cost requirements associated with serving the individual needs of particular new students
  - ✓ Creating a lower entry tuition cost for out-of-district students may be legally challenged and would create a cost burden to absorb new students into district programs
  - ✓ Sharing district programs (and costs) with other districts may be a more feasible means for sustaining or extending student access to educational options and services

### **Overarching Discussion Question:**

Given that Rhinebeck currently provides middle level education within a 6-8 school, in what ways could and would middle level education be provided were the district to reorganize into a K-6 and 7-12 school structure?

### **Meeting Summary: October 18, 2019**

#### **Key Points**

1. Based on enrollment projections, it would be possible to retain the 6<sup>th</sup> grade class at Chancellor Livingston Elementary School (CLES) in 2021-22.
2. The immediate impact of such a decision would be to bifurcate middle level education as it has come to be known and provided within the Rhinebeck Central School District. This would necessitate evaluating a number of potential scenarios that would effect the scope and direction of middle level education:
  - a. Two separate middle school programs operating separately in two buildings
    - i. One 7<sup>th</sup> and 8<sup>th</sup> grade program located within the 7-12 building, and either
    - ii. A single isolated 6<sup>th</sup> grade middle school program in the K-6 building, or
    - iii. An expanded 5<sup>th</sup> and 6<sup>th</sup> grade middle school program in the K-6 building
  - b. Only one 7<sup>th</sup> and 8<sup>th</sup> grade middle school program operating within the 7-12 school.
  - c. An elementary program that would function as a K-6 school.
  - d. A junior-senior high program that would function as a 7-12 school.
3. Middle level education (MLE) is often described as having a set of essential elements. The process of long range planning should include a careful consideration of this middle level research base prior to and in juxtaposition with any economic modeling that would seek to save district costs through a reorganized two-school model. For example:
  - a. MLE is understood to span any three-grade grouping from within grades 5-8. In Rhinebeck's case:
    - i. This would not be possible in a K-6 and 7-12 scenario.
    - ii. This would minimally require a two-tiered and ongoing curricular and staff development system with supervisory support for MLE within two buildings rather than one.
    - iii. This could require extensive new program development, staff orientation and training were MLE expanded to include 5<sup>th</sup> grade in a 5-6 scenario at Chancellor Livingston Elementary School.
    - iv. There are additional questions that should be considered regarding how any reorganization induced MLE scenario would function administratively. Several illustrations of potential approaches are provided below. In each, one must examine the impact on the administrators involved with particular attention to how the rest of their current responsibilities would or could be accomplished.
      - Approach 1 - With a single dedicated district administrator traveling between two buildings to coordinate either MLE Scenario One (6 plus 7/8) or MLE Scenario Two (5/6 plus 7/8)?
      - Approach 2 - With current elementary and high school principals and assistant principals assuming supervisory and developmental responsibilities for grades 6 for K-6, and grades 7 and 8 for 9-12?
      - Approach 3 - With an expansion of the Director of Curriculum role to plan and direct a two-school MLE curricular and staff development initiative so as to promote overall coherence in MLE for either Approach 1 or Approach 2?

- b. Students within this 10-14 age group have a unique set of social, emotional and intellectual development needs. MLE employs signature practices to fulfill those needs including examples such as: developmentally appropriate pedagogy, instructional teaming, collaborative lesson design, as well as having staff with the appropriate certifications, dispositional orientation and training to engage and support students within these multi-grade settings. In Rhinebeck's case, there are additional questions that must be considered regarding potential impacts of moving to a two-school model. These may include:
  - i. Would a stand-alone 6<sup>th</sup> located at CLES continue to function as a departmentalized MLE program with the same minutes of instruction (e.g., 180 minutes per course with classes held 5x/week)? If so, what impact would there be on the CLES daily master schedule and the utilization of certain common facilities – cafeteria, physical education, STEM lab, playgrounds, movement between classes, etc.?
  - ii. Some may observe that within the 10-14 age span, 6<sup>th</sup> graders are significantly different developmentally than their K-5 counterparts. While one may observe that the latter half of grade five may find 5<sup>th</sup> and 6<sup>th</sup> graders to have grown more contemporary in their development, caution was raised about creating circumstances that would tend to isolate the 6<sup>th</sup> grade class inside of an elementary school setting.
- 4. Other studies should be made of a variety of other program, staffing and operational factors involved with a shift to a two school model, including:
  - a. Staffing - Many current 6<sup>th</sup> grade staff assigned to Bulkeley M.S. have 7-12 teaching licenses with additional elementary school extension certificates so as to teach 6<sup>th</sup> grade in accordance with NYSED regulations. To consider these same individuals for a 5<sup>th</sup> and 6<sup>th</sup> grade placement scenario, especially one predicated on departmentalized delivery systems would require both careful consideration and considerable support.
  - b. Staffing - Adding a 6<sup>th</sup> grade to CLES may require assigning teachers as itinerant personnel between the two K-6 and 7-12 buildings. This would likely require providing travel time and the coordination of building schedules. It may also prove more inefficient and perhaps even greater cost as current itinerant teachers are currently distributed among grades 6-12 in one building rather than two. The need for additional itinerant staff could prove necessary.
  - c. Staffing - With a school-within-a-school approach to middle level education in two buildings, the tightly coupled provision of middle level special education services will need to be examined. Coordination of services with administrators and other personnel would need to be reformulated with any adverse impact to be determined.
  - d. Facility/Program - Would an instructional kitchen facility need to be added to CLES to accommodate a continuation of the Family and Consumer Sciences Program in grade 6 or would that be eliminated?
  - e. Transportation - Given that there would be adjusted student totals for each building in a two school model, the number of busses as well as the start and ending times for particular bus runs should be examined newly. Whether this would yield cost savings or tolerable shifts in bus run times would need to be determined.
  - f. Cafeteria - Should a 7-12 school continue to operate two cafeterias or consolidate lunch services into one cafeteria? What would be the impact on both the 7-12 lunch program and the master schedule?



5. **School Names - A Closing Question:** Though not discussed explicitly, it is worth anticipating a LRP consideration of what will become of school names once a determination has been made about the future of MLE? For example:
  - a. If MLE is provided in two buildings as either MLE Scenario One (6 plus 7/8) or MLE Scenario Two (5/6 plus 7/8) will that mean the name Bulkeley M.S. is retired?
  - b. However, if MLE becomes a 7<sup>th</sup> and 8<sup>th</sup> grade program only, does the designation Bulkeley Middle School remain? Or if MLE is eliminated altogether, does the 7-12 school become Rhinebeck Jr./Sr. High School?
  - c. If Chancellor Livingston incorporates MLE in grades 5 or 6, will it need to be renamed simply as Chancellor Livingston School and drop the “elementary” designation?
  - d. On the other hand, if MLE is eliminated in a K-6 and 7-12 model, does Chancellor retain its “Elementary” name even with 6<sup>th</sup> grade now incorporated within the school?

**Summary Points:**

1. Considerable additional study needs to be made about Rhinebeck’s commitment to the nature of and approach to Middle Level Education (MLE) before a precipitous school reorganization is implemented as a two-school K-6 and 7-12 model.
2. The preservation of current MLE program quality may be at risk in bifurcating it into two schools. Additionally, any isolation of the 6<sup>th</sup> grade as a stand-alone MLE component program appears to lack any particular advantages to students. As to a potential expansion of MLE within a 5<sup>th</sup> and 6<sup>th</sup> grade approach, there are too many unknowns and an insufficient amount of research completed at this time to recommend that as an aspirational result for district reorganization. Furthermore, the district would need to determine the impact on the fifth grade elementary education experience.
3. The impact of bifurcating middle level education would seem to have a greater effect on the current elementary school program and the facility.
4. The complexities of developing, supervising and supporting a two-school version of MLE in Rhinebeck may mitigate against significant professional staff savings. This includes consideration of future deployment and/or retention of administrative personnel, as well as a careful examination of the need to distribute teaching personnel within full or part-time itinerant school assignments. On the other hand, it is possible that potential staff savings may derive from consolidations of office or cafeteria functions and personnel.
5. Before savings estimates can be determined regarding transportation and bussing services, studies of potentially re-distributed grade level students and master schedules will need to be further examined.
6. Balancing fiscally responsibility while ensuring and maintaining Rhinebeck’s commitment to educational excellence has been at the core of the Board’s approach to long-range planning. The Administrative Team advocates that the LRP process take full advantage of the year ahead to incorporate middle level education research and studies of impact prior to any future school consolidation decision. Absent doing so, realizing fiscal savings could become a blunt instrument and contextual rival to preserving and enhancing educational quality.

