DOCUMENT RESUME

ED 408 661 EA 028 382

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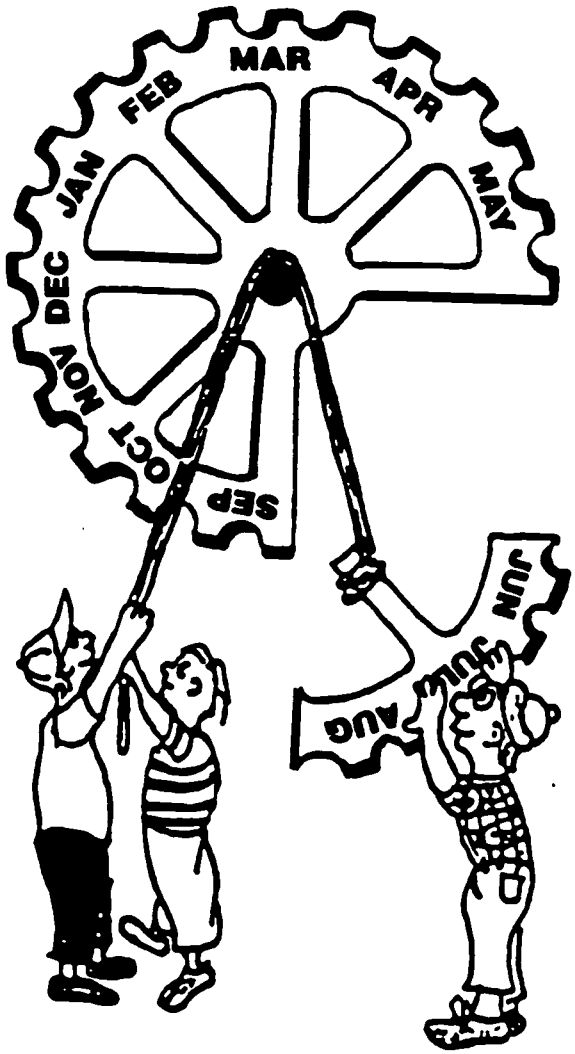
TITLE Year-Round Education: Does It Cost More?
PUB DATE 10 Feb 97
NOTE 57p.
PUB TYPE Guides - Non-Classroom (055) -- Reports - Evaluative (142)
EDRS PRICE MF01/PC03 Plus Postage.
DESCRIPTORS Capital Outlay (For Fixed Assets); *Costs; Educational Finance; Elementary Secondary Education; Expenditures; *Extended School Year; Flexible Scheduling; *Operating Expenses; School District Spending; *School Schedules; *Year Round Schools
IDENTIFIERS *Oxnard School District CA

ABSTRACT

The cost-effective management of instructional programs and facilities will continue to be a fundamental educational issue in the 21st century. This handbook discusses issues to be considered in assessing the cost effectiveness of year-round education (YRE). YRE has the potential to enhance student retention of material, reduce teacher and student absenteeism, and reduce the number of new school buildings. The handbook is based on experience of the Oxnard (California) School District, which began phasing in a 60-20 multitrack YRE program in 1976. It asserts that any analysis of the costs associated with YRE must address the operational costs for single and multitrack calendars and its potential to avoid capital costs in multitrack calendars. The handbook offers capital and operational cost studies for 11 school districts or education systems across the United States. It also provides a breakdown of costs incurred by the Oxnard School District for personnel, maintenance, custodial service, utilities, transportation, school lunch programs, materials and supplies, and mobile storage cabinets. Copies of articles about YRE from "Standard & Poors" and "Business Week" are included. (LMI)



YEAR-ROUND EDUCATION

DOES IT COST MORE?

- **Costs for Extended School Year**
- **Operational Costs for Single and Multi-track YRE Calendars**
- **Potential for the Avoidance of Capital Costs in Multi-track Calendars**

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During Mr. Brekke's 36-year professional career in the Oxnard School District, he served as an elementary and junior high school teacher, principal, director, assistant superintendent; and, for twenty years until his retirement in 1994, the district's superintendent.

His bachelors degree is from the University of Oregon. He holds a masters degree from the University of Southern California with additional graduate study at the University of Minnesota.

The Oxnard School District began a phased implementation of a 60-20 multi-track YRE program in 1976. Since the implementation of YRE districtwide, numerous studies have documented substantial cost and educational benefits attributable to the YRE program.

Mr. Brekke is past president of the National Association for Year-Round Education and has written extensively on Year-Round Education, including numerous articles published in professional journals.

In recent years, he has provided workshops, presentations and assistance to many school districts, state education departments and professional organizations throughout the nation.

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YEAR-ROUND EDUCATION:
ITS COST EFFECTIVENESS CAN BE DEMONSTRATED

While educational quality is the primary concern of all educators, cost effective management of our instructional programs and facilities will continue into the 21st Century as a fundamental educational issue.

In recent years, educators and governing boards have been spending more time trimming, snipping and cutting school budgets than in allocating needed new dollars for program enhancement.

Our motto, it seems, has been **"Make do!"** And we should not be surprised when **"Make do"** has come to influence the measure of student achievement in our schools!

While **"Make do"** has been a continuing reality in our schools, when former President Bush launched **America 2000: An Education Strategy** -- he acknowledged that the nation had a critical need for **radically improved, accountable, "break-the-mold schools."**

Though **America 2000** has become **Goals 2000, "Break-the-mold"** schools continue to appear with exciting frequency throughout the nation. Nearly 1.6 million students in 26 states are already enrolled in a **"New Generation of American Schools"** which have broken the mold of the obsolete, agrarian school calendar.

While a wary public is opposing tax increases for any purpose, that same public is making increased demands on schools to raise the academic achievement of its students in modern state-of-the-art classrooms. The compelling question becomes: how can school leaders continue to reduce their budgets without harming the quality of education programs and services to children? The answer may be found in a restructured, reorganized, remolded school system which generates 100 cents of value from a dwindling supply of education dollars.

Doing more and better with less has always been the school manager's challenge; YRE has become an effective response to this challenge -- and a proven means to generate maximum value from limited education dollars.

We are no longer a nation of farmers: the long summer vacation from school is not only an anachronism, it interferes with the momentum and continuity of learning. Research has consistently shown that children lose ground in their educational achievements during a three-month gap in instruction.

The idea of year-round education has undeniable appeal. By modifying the traditional school-year calendar, school districts can take advantage of the huge capital investment which lies fallow during the summer months. Districts can operate the public schools on a year-round basis, providing either more education to the same number of students or more students with the same level of education.

The primary appeal is obvious. By increasing the service one school building provides, a district can decrease the number of new buildings it needs. If a district added the summer months to the school calendar without extending the number of student attendance days, that district could, theoretically, serve 33% more students in a 4-track YRE calendar without laying a single brick.

In spite of our herculean efforts at economy, our nation's schools have fallen far short of the funding necessary to prepare students adequately for good jobs and good lives in the next century. Certainly "throwing more money at schools," as the fashionable cliche has it, will not by itself improve basic education. No one argues seriously that it will. But in the absence of additional resources, carefully targeted to their best use, good jobs and good lives will illude a growing proportion of our nation's population.

We no longer can afford nor educationally justify the outmoded September-June school year. America's restive taxpayers can legitimately expect greater productivity from a **$414-billion** annual investment in our public schools than idle, unused classrooms for one-fourth of each school year. Unfortunately, in some circles, to suggest that the agrarian school calendar may be obsolete or educationally harmful is like hinting that mom's apple pie is laced with arsenic.

Year-Round Education is essentially a restructuring of the school calendar with seemingly endless possibilities; these possibilities generally fall into three categories: **extended school year**, the **single track calendar** and a host of **multi-track calendar** configurations.

While a school's curriculum, instructional strategies, and the normal array of student programs and services remain essentially the same in any of the YRE calendar formats, a district may select a particular YRE calendar for a variety of reasons: educational benefit, increased building capacity, climate, a seasonable workforce or other unique local conditions.

As the feasibility of a Year-Round Education program is being considered, it is important that a careful evaluation be made of the cost, a school's ability to maintain quality educational programs, and the impact that YRE plan may have upon the operational/support services of the school district.

With these considerations in mind, an attempt has been made to set forth some observations drawn from 17 years of YRE experience which may be useful for those contemplating a YRE calendar plan.

Any analysis of the costs associated with year-round education, therefore, must address:

- **Costs for an Extended School Year**
- **Operational Costs for Single and Multi-track YRE Calendars**
- **Potential for the Avoidance of Capital Costs in Multi-track YRE Calendars**

A NEW WAY TO DO BUSINESS

America's public education must find new ways to meet its challenges if it is to survive and succeed. The public's confidence in its schools is at an all-time low. Changes in demographics and in the socio-economic condition of children lead one to predict that, unless ***significant changes*** occur in the schooling processes, future outcomes will only be worse than current ones.

YRE can be one of those ***significant changes***!

COST PER DAY FOR LENGTHENING THE SCHOOL YEAR

January 1995

STATE	DAILY EXPENDITURE PER PUPIL.*	NUMBER OF PUPILS STATEWIDE	EXPENDITURE PER DAY STATEWIDE*
ALABAMA	$23.21	728,533	$16,909,251.00
ALASKA	$54.51	122,291	$6,666,082.00
ARIZONA	$24.49	695,682	$17,037,292.00
ARKANSAS	$21.94	443,023	$9,719,925.00
CALIFORNIA	$25.67	5,285,000	$135,668,950.00
COLORADO	$26.08	625,062	$16,292,865.00
CONNECTICUT	$46.83	497,328	$23,289,870.00
DELAWARE	$36.59	105,547	$3,861,965.00
D.C.	$47.96	80,678	$3,869,317.00
FLORIDA	$29.64	2,040,763	$60,488,215.00
GEORGIA	$24.85	1,235,304	$30,697,304.00
HAWAII	$32.98	179,876	$5,932,310.00
IDAHO	$23.38	236,774	$5,535,776.00
ILLINOIS	$31.36	1,886,947	$59,174,658.00
INDIANA	$32.72	961,413	$31,457,433.00
IOWA	$31.30	497,892	$15,583,707.00
KANSAS	$31.41	458,538	$14,402,679.00
KENTUCKY	$29.57	639,200	$18,901,144.00
LOUISIANA	$26.71	780,346	$20,843,042.00
MAINE	$34.55	212,245	$7,333,065.00
MARYLAND	$36.12	772,638	$27,907,685.00
MASSACHUSETTS	$36.73	865,618	$31,794,149.00
MICHIGAN	$36.52	1,609,304	$58,771,782.00
MINNESOTA	$37.97	811,295	$30,798,996.00
MISSISSIPPI	$19.06	503,374	$9,594,308.00
MISSOURI	$26.68	851,086	$22,706,974.00
MONTANA	$29.31	164,891	$4,832,955.00
NEBRASKA	$28.86	283,935	$8,194,364.00
NEVADA	$27.55	235,800	$6,496,290.00
NEW HAMPSHIRE	$33.30	184,916	$6,157,703.00
NEW JERSEY	$55.90	1,152,205	$64,408,260.00
NEW MEXICO	$27.59	299,343	$8,258,873.00
NEW YORK	$47.78	2,746,780	$131,213,436.00
NORTH CAROLINA	$27.62	1,123,636	$31,034,826.00
NORTH DAKOTA	$24.72	119,115	$2,944,523.00
OHIO	$34.45	1,812,300	$62,439,735.00
OKLAHOMA	$23.12	603,600	$13,955,232.00
OREGON	$33.71	515,774	$17,386,742.00
PENNSYLVANIA	$45.67	1,745,230	$79,704,654.00
RHODE ISLAND	$37.58	144,932	$5,446,545.00
SOUTH CAROLINA	$25.26	635,883	$16,062,405.00
SOUTH DAKOTA	$27.05	135,267	$3,658,972.00
TENNESSEE	$23.33	857,051	$19,995,000.00
TEXAS	$28.97	3,606,457	$104,479,089.00
UTAH	$18.99	468,675	$8,900,138.00
VERMONT	$44.12	99,717	$4,399,514.00
VIRGINIA	$30.87	1,068,492	$32,979,721.00
WASHINGTON	$31.99	921,337	$29,473,571.00
WEST VIRGINIA	$32.17	312,750	$10,093,338.00
WISCONSIN	$38.89	841,856	$32,739,780.00
WYOMING	$32.91	100,899	$3,320,886.00
TOTAL	US AV $31.99	43,283,999	$1,384,654,776.00

*Figures calculated by the National Association for Year-Round Education, P.O. BOX 711386, San Diego, CA 92171-1386 (619) 276-5296

Data source: National Education Association, *Estimates of School Statistics*, 1993-94, and Education Commission of the States

OPERATIONAL COSTS

The enormous range of variables which exists from one district to another has made calculations and comparisons of YRE operational costs a very complex process.

However, as more and more YRE districts have completed an analysis of their operational costs, a growing body of data has produced some generally consistent findings.

When the question is asked: Do multi-track YRE programs cost more? the answer is a definite **YES** and a possible **NO**.

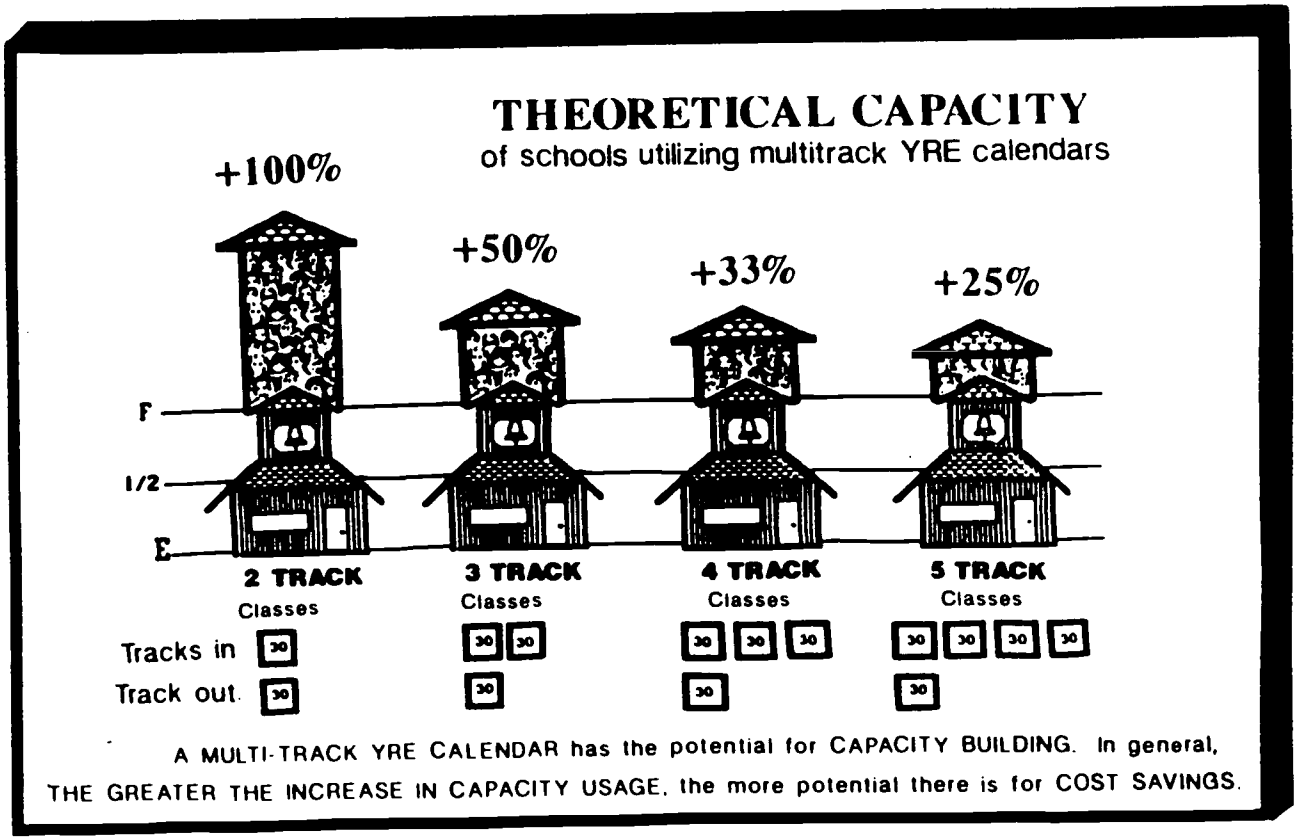
Single-track YRE Programs

Since single track YRE programs generally provide the typical 180-day instructional year with three or four shorter vacation periods instead of the three-month summer vacation break, operational costs should not significantly exceed those required for the traditional school year.

Costs for staff, the operation of the school's physical plant, instructional materials and supplies, including any other expense for maintaining a 180-day instructional year should be similar to those required for a traditional school year.

Multi-track YRE Programs

A multi-track YRE calendar has the **potential for capacity building**: a two-track calendar may increase a school's seating capacity by **100%**; a three-track calendar may increase a school's seating capacity by **50%**; a four-track calendar may increase capacity by **33%**, and a five-track calendar may increase a school's capacity up to **25%**.



A MULTI-TRACK YRE CALENDAR has the potential for CAPACITY BUILDING. In general, THE GREATER THE INCREASE IN CAPACITY USAGE, the more potential there is for COST SAVINGS.

Such has been the finding in Oxnard, San Diego, Visalia, Woodland and the Cajon Valley school districts in California. When a school reaches a YRE multi-track capacity ranging between **115%** to **120%** of its traditional-year capacity, the operational costs-per-student reach a "break-even" point with the costs per student in the same school operating at capacity on a traditional calendar. In large part, this reduction in per-pupil cost is a product of an **economy of scale**.

IDLE CAPACITY IS A TOTAL LOSS

While our primary concern is educational quality, cost effectiveness has become a fundamental educational issue. Dr. Frank W. Davis of the University of Tennessee makes a profound observation concerning the cost effectiveness of our schools when he states that:

> "A service organization does not produce a product, but rather **builds capacity to serve.** A hotel produces the capacity to house a given number of guests each day. A hospital produces the capacity to perform X hours of surgery and to house Y patients. **A school develops the capacity to process W students per academic year; there is no value in unused capacity.** There is no public benefit in empty hotel rooms, unused operating rooms, or school classrooms vacant from June to September. **Community value occurs only to the degree that the capacity is used.** Idle capacity is a total loss, creating only cost while providing no benefit."

The following analysis of operational functions and costs relates specifically to **multi-track** YRE programs.

Obviously, operating a four-track YRE program which utilizes a school facility 242 days per year at 115% of capacity usage incurs a greater overall cost than maintaining the same school at capacity for 180 school days.

To avoid a comparison of apples and oranges, any analysis of YRE operational costs must be computed on a cost per pupil per year basis.

While all students in Oxnard are enrolled for a 180-day school year, a full range of pupil services must extend for the full 242 days when three of the four rotating tracks are always in session.

Teachers are assigned to one of the four YRE tracks with a 183-day duty-year and share their students' vacation periods. Most other staff, however, are assigned to 12-month contracts, i.e. administrators, cooks, office staff, bus drivers, custodians and related support personnel.

For a four year period, beginning with the 1981-82 school year and ending with the 1985-86 school year, the **Oxnard School District** had the opportunity to compare the costs involved in maintaining schools on the Year-Round Calendar and the Traditional Year Calendar.

During each of these years, an analysis of the operational costs for maintaining the year-round calendar and the traditional year calendar indicated, for comparable budget accounts, that the YRE program costs averaged approximately **5.5% ($123) less per student per year** than required for the traditional program.

Economy of Scale

Based upon a four-year cost analysis prepared by the **Oxnard School District**, the costs per pupil in a YRE school equalled those of a traditional school, when the YRE school's enrollment exceeded the traditional school's enrollment capacity by 15%.

Since Oxnard's YRE schools, during this period, were loaded at 120% of their traditional year capacity, the per pupil cost averaged **5.5% less** than operating the same school at capacity on a traditional calendar. A YRE school, therefore, with its traditional-year capacity increased from 800 to 920-students, provided the identical educational program and services for **$123 less** than the per pupil cost for 800 students in the traditional school. A cost savings of $123 per student multiplied for a 920-pupil YRE school generated a total operational savings of **$113,000.**

The Oxnard study also found that a YRE school loaded at only **110%** of its traditional year capacity would incur an operational cost increase which is approximately **5.5%** greater than the District's cost per pupil on the traditional school calendar.

The Cajon Valley Union School District, in a similar cost study, found that a YRE program which accommodates a **25%** enrollment increase -- from 600 to 750 students -- generated **$99,982** of net revenue in excess of expenses.

The Cajon study calculated a "break-even" per pupil cost when a school's traditional-year capacity is increased by **17%** in a multi-track YRE program.

The Visalia Unified School District, in its "Analysis of Traditional School Cost and Year-Round Cost," found that a 600-student traditional school which increases its enrollment in a YRE program by **15%** to 690 students can reduce the operational cost-per-student by **$9** per year. A **30%** enrollment increase from 600 to 780 students generated a $51 reduction in operational costs-per-student -- a savings of about **$40,000** annually.

Studies of traditional year and YRE operational costs generally confirm that there are **economies of scale** and that **the greater the increase in capacity usage, the more potential there is for cost savings.**

ECONOMY OF SCALE

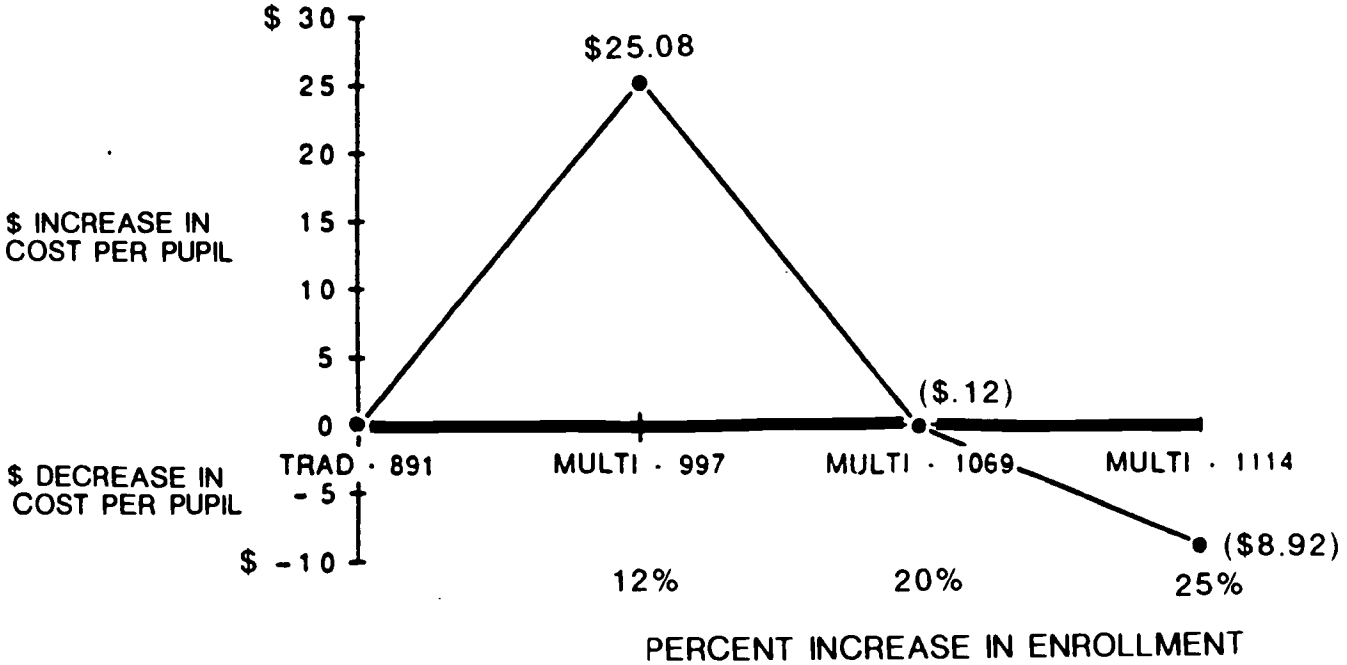
In general, the greater the increase in capacity usage, the more potential there is for cost savings.

SAN DIEGO CITY UNIFIED SCHOOL DISTRICT

Operational Cost Analysis of YRE

Comparision of Traditional and Multi-track Enrollment and Cost Per Pupil with Enrollment Increases of 12%, 20% and 25%.

The San Diego City Schools have found, in their cost analysis, that the operational costs per pupil reach a break-even point when a school's enrollment is increased by **20%** of the school's traditional-year capacity. Students housed beyond the **20%** break-even point will generate a cost savings.



Stress the *WHYS* of reform/restructuring, not the *HOWS*

Core beliefs will create a commitment to change

CAJON VALLEY UNION SCHOOL DISTRICT

Operational Cost Analysis of YRE

Based on 25% Increased Enrollment

BALLANTYNE SCHOOL

REVENUE

Traditional Enrollment 600 x .97 = 582 ADA x $2220.96	=	$1.292.599
Year-Round Enrollment 750 x .97 = 728 ADA x $2220.96	=	1,616,859
INCREASED REVENUE	=	$ 324.260

EXPENSES

● Salaries

Principal (215 days - increase of 19 days)	$ 4.644
Secretary (12 months)	3.969
Clerk Typist (12 months) }	2.823
School Clerk (12 months) }	
Clerical Aide	1.401
Teacher-New:	
(150 increased Enrollment ÷ 30 = 5 Teachers)	124.785
Teachers-Set Up/Take Down:	
(25 Teachers. 2 Days Each = 50 Days)	10.269
Nurse (1 Day Per Week. 8 weeks)	1.517
Psychologist	1.594
Librarian	3.649
Health Aide	959
TOTAL SALARIES =	$155.610

● Utilities

Air Conditioning (5 Years @ $36.000/year)	$ 36.000
A/C Operating Cost (88¢ sq. ft.-based on comparison with Rios)	12.000
Utilities (Currently $14.750, Yr. Round Est. $16.500)	1.750
Water, Sewer, Trash Pick-Up	530
TOTAL UTILITIES =	$ 50.280

● Other

Transition Costs (Nonrecurring Inservice for Teachers, Informing Parents/Community)	$ 5.000
Books, Supplies, Etc. (NSR $19.85 + $2000 Supp. Text x 150 Enrollment)	4.978
Equipment (Portable Cabinets)	8.500
TOTAL OTHER =	$ 18.478

SUMMARY

Total Estimated Revenue	$324.260
Total Estimated Expenses	224.368
NET REVENUE IN EXCESS OF EXPENSES	**$99,982**

The per pupil costs of students enrolled in a YRE multi-track program equal the per pupil costs of students enrolled in the traditional school year program when the YRE enrollment is increased by 17%.

VISALIA UNIFIED SCHOOL DISTRICT

Operational Cost Analysis of YRE

INCREASE IN CAPACITY USAGE BY 15%

A school with a 600-student traditional year enrollment capacity:

(1) may increase its capacity (15%) to accommodate 690 students by **adding 3 classrooms.** An annual cost of $29,880 for 7 years will be required to retire a loan of $209,160 for these 3 classrooms.

(2) may increase its capacity (15%) by implementing a multi-track YRE program **without added classrooms.** The operational cost per student for a YRE school serving 690 students is approximately the same as the cost per student in a traditional school serving 690 students when the operational costs for 3 additional classrooms are included.

Position/Item	Traditional School (1)	Year-Round School (2)
Principal	$53,309	$58,226
School Secretary	16,282	19,188
Clerk Typist	14,194	17,736
Cafeteria Workers	6,618	8,288
Custodial Workers	32,256	34,406
Teachers salaries (23)	$765,670	$765,670
Total Salaries	**$888,329**	**$903,514**
Additional Facilities	29,880 (1)	0
Utilities	28,393	33,156
Transportation	64,746	64,746
Maintenance Cost	37,065	43,283
Material and Supplies	13,628	13,628
Total non-personal expense	**173,111**	**154,812**
Total cost of operation	**$1,061,440**	**$1,058,326**
Cost per student	**$ 1,538**	**$ 1,534**

INCREASE IN CAPACITY USAGE BY 30%

A school with a 600-student traditional-year enrollment capacity:

(3) may increase its capacity (30%) to accommodate 780 students by **adding 6 classrooms.** An annual cost of $59,760 for 7 years will be required to retire a loan of $418,320 for these 6 classrooms.

(4) may increase its capacity (30%) by implementing a multi-track YRE program **without added classrooms.** The operational cost per student in a YRE school serving 780 students is $51 less than the cost per student in a traditional school serving 780 students when the operational costs for 6 additional classrooms are included.

The total annual operational savings for a YRE school maintaining a 30% increase in capacity usage to 780 students is **$39,780.**

Position/Item	Traditional School (3)	Year-Round School (4)
Principal	$53,309	$58,226
School Secretary	16,282	19,188
Clerk Typist	14,194	17,736
Cafeteria Workers	6,618	8,288
Custodial Workers	32,256	34,406
Teachers salaries (26)	865,540	865,540
Total Salaries	**$988,199**	**$1,003,384**
Additional Facilities	59,760 (3)	0
Utilities	31,228	33,156
Transportation	73,191	73,191
Maintenance Cost	40,766	43,283
Material and Supplies	15,405	15,405
Total non-personal expense	**220,351**	**165,034**
Total cost of operation	**$1,208,550**	**$1,168,418**
Cost per student	**$ 1,549**	**$ 1,498**

LODI UNIFIED SCHOOL DISTRICT

lodi unified school district
OFFICE OF THE SUPERINTENDENT
1305 East Vine Street, Lodi, California 95240

Projecting to the year 2002, the estimated cost (in 1993 dollars) to house students under three different scenarios is summarized in the following table. We have assumed: K-6 elementary schools at 650 student capacity and 7-8 middle schools at 800 student capacity; standard State loading of 30 students per room for elementary and middle schools and State cost of construction; State capacity of existing schools (as opposed to how we are really using classrooms to meet program requirements, which results in a lower capacity); and no State lease portables included in capacities.

Cost of New Facilities to House K-8 Students in 2002
Three Calendar Options
Lodi Unified School District

Grade	Traditional Calendar	4 Track YRE 180 days possible	3 Track YRE 163 days
K-6 Elementary	$37,129,088	$12,481,425	$5,043,000
7-8 Middle	$27,422,670	$17,017,230	$14,849,430
Total K-8	$64,551,758	$29,498,655	$19,892,430

The following table summarizes our 1992/93 school year housing situation in terms of unhoused students and the estimated cost to house those students for each calendar option assuming: $7,641 per student for K-6 and $12,977 per student for 7-8; and capacity of existing schools based on program use, not State standards. The October 1992 K-6 enrollment was 13,192 students and the 7-8 enrollment 3,676 students.

1992/1993 Unhoused Students and Cost to House Those Students
Three Calendar Options
Lodi Unified School District

Grade	Traditional Calendar	4 Track YRE 180 days possible	3 Track YRE 163 days
K-6 Unhoused students	13,192 students - 9,572 capacity = 3,620	13,192 - 12,132 = 1,060	13,192 -13,262 = N/A
K-6 Housing Costs	$27,660,420	$8,099,460	N/A
7-8 Unhoused students	3,676 students -2,487 capacity = 1,189	3,676 -3,261 = 415	3,676 -3,567 = 109
7-8 Housing Costs	$15,429,653	$5,385,455	$1,414,493
Total K-8 Unhoused Students	4,809	1,475	109
Total K-8 Housing Costs	$43,090,073	$13,484,915	$1,414,493

EXECUTIVE SUMMARY

Our cost model indicates that some financial savings do result from YRE due to a reduction in certain fixed costs (e.g., physical facilities and various operating costs) which are spread over a constant student population thereby reducing annual fixed costs per student. Although we were not specifically engaged to analyze variable costs, (e.g., instructional costs, student supplies), we believe that these costs remain relatively constant on a per student basis. This is consistent with our review of similar analyses performed for other school districts. As demonstrated in our cost model of four NME schools versus three YRE schools, cash flow to the District would be increased through the selection of the YRE alternative. These savings are:

Annual Cost Savings of Implementing Three YRE Schools for Every Four NME Schools

- Estimated Annual Capital Costs Avoided $430,000
- Estimated Annual Operating Costs Saved $235,000

COSTS INCLUDED IN ANALYSIS	Behavior	Classification	Category
Construction and Equipment Cost			
Construction Cost	Fixed	Direct	Capital
Capital Items	Fixed	Direct	Capital
Operating Expenses			
Custodial	Fixed	Direct	Operating
Utilities	Fixed	Direct	Operating
Maintenance	Fixed	Direct	Operating

Our cost model assumes a hypothetical school district of 2,400 elementary school age students. In this model, one YRE school can serve 800 students per year or one NME school can serve 600 students per year.[1] To serve the total student population, the school district has two options

OPTION	SCHOOL TYPE	CAPACITY	SCHOOLS REQUIRED	STUDENTS SERVED
1	YRE	800	3	2,400
2	NME	600	4	2,400

[1] The existence of the "phantom" school is well documented in many studies of year-round education. The District has also indicated that it believes three YRE schools can serve approximately the same students as four NME schools.

CASH FLOW TO DISTRICT WITH INCREASE IN STUDENTS TO YRE CONCEPT

Additional Students	2,400	4,800	7,200	9,600
Annual Operating Cash Outflow Saved	$235,000	$470,000	$705,000	$940,000
Annual Capital Cash Outflow Saved	$430,000	$860,000	$1,290,000	$1,720,000
Cummulative Capital Costs Avoided	$4,500,000	$9,000,000	$13,500,000	$18,000,000

Growth over the last ten years has averaged 1,000 new elementary students per year. Assuming student growth continues in the future, this model indicates costs that could potentially be saved at the additional students levels.

RESULTS OF ANALYSIS

The cost model used in this analysis indicates cost savings would be achieved when the YRE option is utilized. This occurs because twelve month utilization of school facilities allows direct, fixed expenses to be reduced while serving the same student population. Additionally as previously stated, it appears that variable costs per student do not to change substantially under the YRE concept.

This cost model assumes an environment where school enrollment is expanding. Within this scenario, YRE is clearly advantageous from a capital and site-based operating cost perspective. Even though our analysis does not address steady or declining enrollment, nor conversion of existing NME schools to YRE schools, we believe many of the same cost advantages identified in our summary could still be realized by moving to the YRE concept. We have not quantified these savings nor do we represent that the savings will be at the level identified in the cost model.

CLARK COUNTY (Nevada) SCHOOL DISTRICT

YEAR-ROUND VS. NINE-MONTH COST ANALYSIS

MAY, 1991

INTRODUCTION:

As part of a comprehensive study of year-round education within the Clark County School District, an in-depth analysis of the cost of operating year-round schools versus traditional nine-month schools was conducted.

Complete data from FY 1989-90 was used for analysis. This data was then driven into the target school populations of 750 for year-round and 600 for nine-month traditional. Although they are not statistically pure models, the schools that come closest to these target populations were John S. Park Elementary for nine-month schools and Harvey N. Dondero Elementary for year-round schools. The salaries were then adjusted to the FY 1989-90 data for analysis purposes.

COMPARISON OF OPERATING COSTS BETWEEN NINE-MONTH AND YEAR-ROUND SCHOOLS

ENROLLMENT	MAINTENANCE	ENERGY	SALARY	COST/PUPIL
YR 750	46,280	51,960	1,838,871	2,583
9-MO.600	41,530	44,154	1,443,412	2,548

This data indicates an added cost of $35 per student at a year-round school; an additional maintenance cost of 11.4 percent; and, a 17.68 percent additional energy cost.

COST AVOIDANCE

In addition to the above, cost avoidance was computed on a per student basis. This cost avoidance was computed on not having to build an additional school based on a 25 percent greater production of students through the year-round school. Cost avoidance was broken into three areas of capital, maintenance, and energy. Based on 1991 dollars, $238 per student per year was avoided as a capital cost; $69 was avoided for maintenance costs; and $74 was avoided for energy cost for a total cost avoidance of $381 per year per student. This figure means that for each student that comprises the twenty-five percent increase at the year-round school, $381 per year is avoided.

COST AVOIDANCE

Capital Cost Avoidance

- Planning Factors
  - -- Elementary School
  - -- 600-Student Design
  - -- 40-Year Building Life Cycle
  - -- 1991 Dollar Basis

-Construction Contract	$3,750,000
-Architect & Engineering	225,000
-Furniture & Equipment	375,000
-Landscaping, Telecom, Misc.	225,000
-Administrative (Including Costs of Bonds)	562,500
-Site Acquisition (10 acres)	535,000
TOTAL	$5,712,500

-Yearly Avoided Capital Cost Per Student (5,712,500 ÷ 40 ÷ 600)	$238
-Maintenance Cost Avoidance (41,530 x 40 ÷ 24,000)	69
-Energy Cost Avoidance (44,154 x 40 ÷ 24,000)	74

TOTAL COST AVOIDANCE PER STUDENT $381

SUMMARY:

The cost study indicates that cost for each student in a year-round school is more expensive than a traditional nine-month school. This increased cost, however, is significantly offset by cost avoidance.

JEFFERSON COUNTY (Colorado) SCHOOL DISTRICT

NEW COST SAVINGS DISCOVERED IN YEAR-ROUND SCHOOLS

The Cost of Discontinuing Year-Round Schools in Jefferson County, Colorado

William D. White, Ed.D.
Former Assistant Superintendent, Jefferson County School District

July 1990

The fourteen year experience with year-round education in Jefferson County, Colorado had generated a cost savings of 87.7 million dollars of bonded indebtedness and 20 million dollars in capital reserve when the multi-track program was terminated in 1988. However, **it was the unreported savings in operating costs which surprised and dismayed the district's leadership** when all the new schools necessary for a traditional 9 month operation were opened and these costs became evident.

In this large suburban school district of more than one hundred schools west of Denver, the teachers in the program indicated that they preferred their year-round schedule by as much as **90 per cent,** but a desire for change, without regard for teachers' opinions, emerged and eight new schools were built to return to a more traditional calendar.

When the year-round program was launched in Jefferson County in 1974, the primary reason for its implementation was to **increase the capacity of schools and save building costs.** It was hoped that there might be some educational benefits but that would be a bonus that may or may not come about. **No savings in operating costs was expected.** In fact there was considerable discussion and concern for the increase in costs that would be required to put on a full staff to keep the buildings open an extra 3 months of the 252 day school year.

Principals and teachers became aware over the years that there were savings in operating costs which accrued as they expanded the capacity of their buildings to serve boys and girls in new communities without schools. **For each two schools placed on the year-round schedule the district gained the capacity for a third school free** and each of these, free school capacities or "phantom schools" had an enrollment from neighborhoods now accommodated by the schedule of their existing school rather than by bricks and mortar in the new community.

During the 14 years that Jefferson County operated multi-track (Concept 6) year-round schools, these savings were never acknowledged in the preparation of the annual budget. There was never a record of reduction in operating costs per pupil achieved by year-round scheduling.

Unknown to the Board, **year-round school principals and teachers avoided purchasing books for their total membership** since only two-thirds were present in school at a time. They were recycling these funds into other kinds of instructional supplies for enrichment of instructions. When areas of the District reverted to a single track nine month operation, there was a shortage of books because every child needed books at the same time.

On August 11, 1988 the Jefferson County Schools terminated the multi-track year-round school program. The phase-out of the last 14 elementary schools, 4 junior high schools and 2 senior high schools was completed and their enrollments above capacity were moved into newly constructed buildings. Six new elementary schools and two new high schools were completed.

When the existing membership of pupils was moved from a year-round school where they had been accommodated by year-round scheduling into a newly constructed school on a nine month calendar the costs were up dramatically. **Each of the new elementary schools had an average per annum increase in operating budget for the existing enrollment of $260,000. For the high schools the increase was $1,000,000 and for the junior highs it was $700,000.**

After 14 years of experience there was no controversy over the school calendar. Whole generations of pupils had completed their school careers under a year-round schedule; except for small segment of the parent population, it was generally well accepted.

Perhaps the greatest mistake made by the district was not keeping records of dollars saved over the years the year-round program was in operation.

In year-round scheduling, school managers can increase the availability of revenue through cost reduction, cost avoidance and cost deferral. When any one of these practices is discontinued, it is essential that figures be available to show decision makers the impact of their actions. For this reason, it is appropriate to maintain a section of the annual budget document which reports activities that save costs and the disposition of funds gained through these modifications.

No one knows exactly how much was saved by the Jefferson County School District during the year the year-round program was in effect. **We know that 87.7 million dollars were spent in bonded indebtedness and 20 million dollars were spent from the annual capital reserve budget for new construction required to return all schools to the traditional calendar.** However, **the more important savings in the long run was the $3,560,000 in operating cost saved per annum on the last 20 year-round schools.**

COST OF DISCONTINUING THE YEAR-ROUND PROGRAM IN THE JEFFERSON COUNTY PUBLIC SCHOOLS

Construction Costs

Bonded Indebtedness — (eight new schools)	$ 87,700,000
Capital Reserve For New Construction	20,000,000

Operating Cost Increase Per Annum

	1986–87	1987–88	1988–89	
Six Elementary Schools		1,040,000	1,560,000	
Two High Schools	1,000.00	1,000,000	2,000,000	
				$ 6,600,000

Flat Grants To New Schools

Instructional Supply (six elementary schools)	$ 180,000
Instructional Supply (two high schools)	$ 100,000
Phase–In Costs (eight schools)	$ 1,600,000
Total Cost Through Sept. 1989	$116,180,000

ORANGE COUNTY (Florida) PUBLIC SCHOOLS

NOVEMBER 12, 1991

ANALYSIS OF OPERATING COSTS OF YEAR-ROUND EDUCATION PILOT SCHOOLS

Prepared by Orange County Public Schools' Business Services Team

Facility Savings Realized from Converting Schools from Traditional Schedules to Year-Round Schedules

Utilization of a five-track student schedule permits an existing school to increase its capacity by 25 percent. Elementary schools currently being constructed in Orange County are designed to adequately house 599 students on the traditional nine-month instructional calendar.

Implementation of the five-track year-round schedule enables an elementary school to increase its student capacity to 748 students without the necessity of any additional construction, major modifications, or additional relocatable classrooms.

The housing of 2,995 elementary school children can, therefore, be accomplished through the construction of five additional schools using a traditional school calendar, or through the construction of four additional schools using a five-track year-round calendar. In other words, for each four elementary schools placed on a year-round schedule, the school district avoids the cost of constructing an additional elementary school.

Based on the current total cost of constructing an elementary school (land, site development, construction, equipment, architectural and engineering fees, etc.), this enables the school district to avoid $7,285,000 in capital expenditures for each 2,995 students placed in year-round education programs. This represents a cost avoidance, in present dollars, of $2,432 per student.

According to the best data available, if the School Board approves the recommendation of the Year-Round Education Task Force, a savings of approximately 64 million dollars in construction costs will be realized, including nine school sites requiring a minimum of 15 acres per site. Additional savings of approximately five million dollars annually will be realized because it will not be necessary to staff the nine schools with principals, secretaries, special area teachers, curriculum resource teachers, media specialists, clerks, guidance counselors, custodians and lunchroom personnel. It should be noted that some of these savings will be offset because some of these positions will need to have contracts extended from 10 to 12 months in the multi-track schools. Utilities costs savings for nine schools also will be realized in the amount of $162,000 yearly.

FISCAL BRIEF

Department of Business Services
Orange County Public Schools
Orlando, Florida

March, 1994 No. 94-01

OPERATING COSTS PER STUDENT

Traditional vs. Year-Round Schools
1992-93

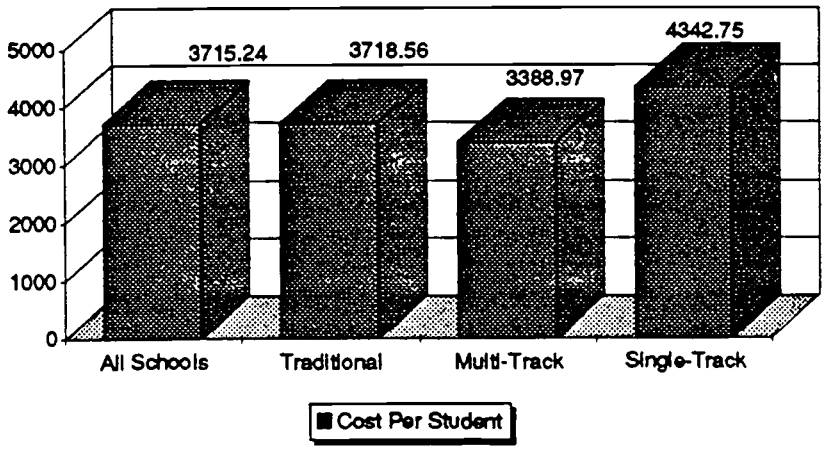


Figure 1.

At the beginning of the 1990-91 school year three Orange County elementary schools were placed on a year-round schedule. Two of these schools -- Aloma Elementary and Palm Lake Elementary -- were converted to a five-track schedule with multiple vacation periods in which one-fifth of the total enrollment was out of school at any time during the instructional year. One school -- Tangelo Park Elementary was placed on a similar schedule with multiple vacation periods throughout the year, but with one significant difference -- all students were assigned an identical schedule.

The original intent of the multiple track plan was to increase the student capacity of each school by 25 percent, thereby avoiding the cost of building additional facilities to house a growing student population. An additional purpose was to determine if more frequent, and shorter, vacation periods would result in improved performance on the part of students.

The intent of the single track plan was solely to improve the performance of the students – particularly those students from disadvantaged backgrounds – by shortening the vacation periods and by providing opportunities for students with the greatest need to receive additional remedial and enrichment instruction during these vacation periods when the regular program was not in operation.

Therefore, in examining the cost-effectiveness of these programs it is necessary to keep in mind the two distinct purposes for which the programs were instituted – cost avoidance (multi-track schools) and improvement of student performance (single-track schools).

A considerable amount of debate has arisen over the operating costs in year-round schools, and the extent to which any avoidance of the cost of additional facilities might be mitigated by increased costs of staffing and operation for an extended period of time each year. While it is appropriate to examine operating costs in this context, it should be kept in mind that reduction of operating costs is not a purpose for which year-round schools were originally established.

Caution should also be exercised in attempting to make any conclusive determinations regarding operating costs or student performance, based upon statistics covering only a limited period of time. Not only are there a number of factors that can skew financial data in a single year, but there may also be hidden long-term costs that are not evident in a short-term analysis.

In 1991-92 a limited analysis was made by the Business Services Department of the operating costs of two multi-track schools and one single-track school in Orange County, based solely on 1990-91 cost data and representing the first year of year-round operation for each of the schools. That analysis found a significant increase in operating costs for all three schools, but concluded that such costs resulted from controllable policy decisions of the School Board and administration, and were not necessarily inherent in year-round school operation.

That same study also found conclusively that utilization of multi-track calendars significantly reduced the need for new facilities and thereby permitted to school district to avoid costs of building a number of new facilities required to accommodate projected growth.

This Fiscal Brief takes a second look at the issue of costs and cost savings associated with year-round schools by examining the actual documented costs of 17 elementary schools that were operating on a year-round calendar during the 1992-93 school year.
Nine of these schools were operating on a multi-track schedule and eight were operating on a single-track. Three of the schools had been in operation for three years, two for two years, and twelve were in their first year of operation.

Facility Savings Realized from Converting Schools from Traditional Schedules to Year-Round Schedules

Utilization of a five track schedule permits an existing school to increase its capacity by 25 percent. Elementary schools previously constructed in Orange County were designed to adequately house 599 students on the traditional nine month instructional calendar.

Implementation of the five track year-round schedule enables an elementary school which is designed for 599 students to increase its capacity to 748 students without the necessity of any additional construction, major modification, or additional relocatable classrooms.

The housing of 2,995 elementary school children can, therefore, be accomplished through the construction of five additional schools utilizing a traditional school calendar, or through the construction of four additional schools utilizing a five-track year-round calendar. In other words, for each four elementary schools placed on a year-round schedule, the school district avoids the cost of constructing an additional elementary school.

Based on the current total cost of constructing an elementary school (land, site development, construction, equipment, architectural and engineering fees, etc.) this enables the school district to avoid $7,285,000 in capital expenditures for each 2,995 students placed in year-round education programs. This represents a cost avoidance, in present dollars, or $2,432 per student.

No research or additional data is required to document this savings -- it is a matter of simple mathematics. 2,995 students can be housed in either 5 traditional schools of 599 each or 4 year-round schools of 748 each.

Although, generally funds designated for construction purposes may not be utilized for operating purposes, there are conditions under which such funds can be used to relieve certain expenses (i.e., facility maintenance, classroom equipment, textbooks, etc.) in the operating budget. Therefore, minimizing the need for new facilities, to the maximum extent possible, can provide additional funds to support the operating budget. This is especially critical in times such as the present when funds to maintain ongoing operations are extremely critical.

A recently completed report identifies a need for new and renovated facilities in Orange County which is far beyond the ability of the capital budget to fund. It appears that approximately $2.6 billion of facility needs will be necessary during the next 13 years in order to accommodate the expected growth during that period of time. Based on current revenue estimates, it appears that available dollars will fall approximately $900,000,000 short of meeting that need.

Housing the projected students is an absolute necessity, over which the School Board has little or no control. If sufficient dollars are not available in the capital improvement budget, then it is entirely possible that operating funds -- regardless of how limited they may be -- may have to be diverted to the capital budget and utilized to lease relocatable classrooms in order to adequately house each student.

While year-round scheduling does not provide a total answer to the space problem, it certainly does offer an alternative to diverting operational funds to construction -- something that would result in even larger class sizes, inadequate staffing and services, and diminution of quality of the instructional program. In fact, based on the current ability of the state to adequately fund the public education system it offers the only currently available significant alternative.

However, the question so often raised is whether or not the savings in construction costs will be partially or totally offset by additional costs of operating schools for a longer period of time each year. That issue is dealt with in the next section.

Operating Costs of Year-Round Schools

A great number of studies have been conducted throughout the nation over the past two decades, attempting to determine whether or not year-round schools are more costly to operate than schools operating on a traditional schedule. Most of these studies are based on hypothetical models, rather than on actual costs, since there are not many year-round schools which have been in operation for a period of time sufficient to conclusively document costs.

These studies, which have been based on a wide variety of year-round schedules, differ so widely that it is impossible to draw any significant conclusions which can be validated. Part of the problem lies in the fact that, while year-round schedules may be similar in a number of districts, the operating policies of the districts involved vary significantly.

Findings of the original Orange County study concluded that policy issues, which are subject to the control of each school board, may affect the operating cost per student far more significantly than the year-round schedule itself. As examples, policy issues such as those listed below can make a significant difference in the cost per student of a school on a year-round schedule:

- Whether a special formula, more applicable to year-round calendars, is utilized for staffing, or whether all schools are staffed on the basis of a common formula;
- Whether or not activities are scheduled for students during one or more of the periods they are scheduled for vacation;
- Whether or not before-school and/or after-school activities are scheduled for students;
- Whether or not a year-round school is required to provide special programs and services for a greater or lesser number of exceptional and other high-risk students than the average percentage served in traditional schools; and
- Whether the attendance area for the school is primarily urban or rural, and thereby requires either more or less student transportation than the district average.

The 1992-93 operating cost data presented in this Fiscal Brief are based on the operating policies of the Orange County School Board and, findings based on these data may or may not be applicable to the operation of year-round schools in other Florida school districts or in other states. These data include all costs associated with the operation of schools with two exceptions -- federal programs and student transportation.

Expenditures from federal programs generally include compensatory education programs for disadvantaged students, limited funds for handicapped student programs, and reimbursement for free and reduced priced meals for low income students. Since these expenditures are all supplemental to the basic program, removing them from each school makes the data more comparable.

The costs for transportation of students is also excluded because of the fact that the density of the attendance area is far more influential on transportation costs than the school calendar. Although it can reasonably be assumed that year-round schools, by serving a larger attendance area, require a larger percentage of the students to be transported, the cost differential is relatively insignificant when viewed in the context of total operating cost per student.

Figure 1 on page 1 of this Fiscal Brief graphically displays summary cost data for all elementary schools during the 1992-93 school year and compares the operating cost per student of schools operating on a year-round calendar and those operating on a traditional calendar.

In contrast to the study of 1990-91 data which found that operating expenditures at all three year-round schools increased significantly above the district average increase during the first year of operation, the 1992-93 data indicate that the nine multi-track schools are all currently operating at a cost per student considerably below the overall district average and significantly below the average of the schools on the traditional calendar.

The data further indicate that the cost per student for operation of six of the eight single-track school significantly exceeds the district average and the average cost of all schools operating on the traditional calendar.

Individual costs for each school for the years 1989-90, 1991-92, and 1992-93 are itemized in the data beginning on page 11 of this Brief. Schools are ranked from lowest to highest cost per student based on 1992-93 reported costs. Data regarding type and date of implementation for year-round schools are provided in Figure 2 on the page 6.

The data form this study are in start contrast with the 1990-91 study which found operating costs of multi-track schools to be considerably higher than their counterparts on a traditional calendar. However, that study indicated that much of the difference in costs per student could be attributed to initial start-up costs and to decisions regarding staffing that significantly increased the cost.

In the case of the two original multi-track schools (Palm Lake and Aloma) a controllable decision was made by the district administration to increase staff beyond the authorized level of the staffing formula in order to accomplish two objectives -- to assist in dealing with many of the unanticipated details and unknown inherent in the implementation of a totally new scheduling concept, and to give additional administrators direct experience in a multi-track operation in order to have trained personnel available as the program is expanded to other schools.

Conclusions

Based on an review and analysis of the cost data associated with all elementary schools in the school district for the 1989-90, 1990-91, 1991-92 and 1992-93 school years, the following conclusions are offered:

- Placing elementary schools on a multi-track calendar increases the capacity of each school by 25 percent, enabling the school district to avoid one-fifth of the construction costs required to adequately house projected enrollments. This represents a savings -- or cost avoidance -- in construction costs of 2,432 per student.

- Any additional costs associated with implementation of a multi-track year-round calendar in Orange County have been more than offset by the savings realized primarily from increased size and economy of scale. Based on the data available to date **THERE IS NO EVIDENCE TO INDICATE THAT OPERATING COSTS PER STUDENT ARE HIGHER IN MULTI-TRACK YEAR-ROUND SCHOOLS THAN IN THOSE SCHOOLS OPERATING ON A TRADITIONAL CALENDAR.** On the other hand, there is significant preliminary evidence to indicate that implementation of a multi-track calendar may, in fact, result in a reduction of unit operating costs.

- While the operating costs per student for single-track year-round schools generally exceed the average cost of schools on a traditional calendar, it appears that these costs are also often influenced more by size of the school than by the type of calendar. When compared with traditional schools of equivalent size the costs per student in Orange County single-track schools do not appear to deviate significantly.

STATEWIDE EVALUATION OF YEAR-ROUND AND EXTENDED-DAY SCHOOLS

EXECUTIVE SUMMARY

Excerpt

OPINION OF TEACHERS

- Teachers indicated that Year-Round Education was good for students, including improved student attitude (**76%**), students learn more (**73%**), students return from breaks ready to work (**93%**), and Year-Round Education benefits students (**84%**)

- Eighty-four percent of Year-Round teachers responded that, given a choice, they would teach on a Year-Round calendar.

COST ANALYSIS

- Cost analysis of the Year-Round program was complicated by three factors. First, design capacity for a given school is a nebulous figure, which varies depending on its source. Second, many of the schools were over their stated design capacity before implementation of the calendar and, while the quality of life in the school may have increased after implementation, enrollment did not. Finally, several schools have been moved to the Year-Round calendar before enrollment needs because of political expediency.

- Cost analysis of the Year-Round program showed that overall per student personnel costs are not markedly different than prior to the implementation of the program.

- Enrollment levels in Year-Round schools increased between ten to twenty percent after implementation. Per student utility costs are roughly constant. Educational costs are either the same or somewhat lower on the Year-Round calendar and appears to provide a feasible option to new construction. Of course, if new buildings would be needed to otherwise handle the increasing student load, the implementation of a Year-Round schedule saves the per student seat costs of building and financing a new school. This cost is estimated at between $200 and $300 per year per seat.

- The only additional staff which all schools had added was in the office, where additional personnel or additional hours for existing personnel had been added to handle registration and communication needs.

UTAH STATE OFFICE OF EDUCATION

James R. Moss
State Superintendent of Public Instruction

UTAH STATE BOARD OF EDUCATION
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December 22, 1989

YEAR-ROUND SCHOOLS OFFER LESSON IN COST CUTTING

SALT LAKE CITY TRIBUNE, November 22, 1990

Year-round schools have saved taxpayers money and reduced crowding in Utah's public schools, a Utah Foundation study concludes.

Despite continuing enrollment growth in Utah, the private-tax research organization reports that taxpayers are paying less for buildings and school buildings are less crowded.

Capital outlay spending has dropped from $143 million in 1985-86 to $70 million in 1988-89. Foundation analysts said, and year-round scheduling has reduced overcrowding in lunchrooms, halls, playgrounds, libraries, computer labs and other common areas. Capital outlay is the portion of local school district budgets that covers building construction.

The study said the year-round experiment, which started with Westridge Elementary School in Provo School District six years ago, has grown to 65 schools by 1990. This year, 55,282 students or 12.4 percent of the state's public school enrollment are attending year-round schools.

Typically, year-round scheduling places students in different tracks or groups. Usually, three or four of these groups are in school except for holiday breaks while one group is on vacation. Instead of one long summer break, each group enjoys several shorter breaks during different seasons of the year. The arrangement can increase building capacity by as much as a third.

Foundation analysts said year-round schooling reduces learning loss because it eliminates the three-month summer break, improves learning, allows more makeup opportunities for students that are behind in their studies, improves behavior because students are less bored, boosts teacher pay because educators can get longer contracts, reduces student and teacher burn-out, offers varied vacation opportunities, and provides job opportunities for more students.

THE NEED FOR NEW AND MODERNIZED SCHOOLS

"More than 61% of our nation's schools were built during the 1950s and 1960s, and 20% of our schools are 50 years or older.

In New York, Los Angeles, Chicago and Detroit alone, the estimated capital need is more than $200 billion.

Texas is estimated to require 37,000 additional classrooms by 1996, as the school-age population there grows by 1.1 million students. And California is expected to require $25.3 billion in new classrooms by the end of the century, as well as $9 billion for modernization/airconditioning for YRE schools and deferred maintenance."

CEFPI – Council of Educational Facility Planners International

AASA Leadership News, March 15, 1993

CYPRESS-FAIRBANKS INDEPENDENT SCHOOL DISTRICT
FINANCIAL ANALYSIS OF YEAR-ROUND EDUCATION

Houston, TX

MAY 1993

ARTHUR ANDERSEN

ARTHUR ANDERSEN & Co. SC

June 14, 1993

Mr. George Hobson
Cypress Fairbanks Independent School District
P.O. Box 692003
Houston, TX 77269-2003

Dear Mr. Hobson:

We have completed our financial analysis comparing a twelve month multi-track educational program to a traditional ten month program for Cypress Fairbanks ISD (Cy-Fair or the District). The attached report summarizes our findings and observations resulting from this study.

The primary objective of the project was to independently develop a financial analysis which estimates the additional costs or savings, and their effect on the tax rate, which would result from transitioning to a year-round program. As requested by the District, our analysis focuses only on the financial aspects of year-round education (YRE). Other than the information summarized from our benchmarking survey, we have not commented on the non-financial aspects of year round education, such as quality of education, community preferences or social impacts. In addition, the financial model we developed is not a forecast or projection as defined by the AICPA, but represents an estimate of potential savings under YRE based on data provided by your committees and evaluated by us for reasonableness.

Based on the assumptions used in this model, the District can expect to save approximately $38 million over the 1994 through 1998 time period, or about $688 per student, by undertaking year-round education. This translates into approximately $404 of property tax savings over five years for a $100,000 house. The bulk of these savings will be derived from the avoided construction of high schools, since they have a significantly higher construction cost than elementary and junior high schools. Seven schools could be avoided over this five-year period. The total capital cost of these schools is over $96 million, which would normally by financed through bond issuances.

Our benchmarking survey indicated that per student costs were slightly less under year-round education for elementary schools. Insufficient data was available to estimate cost savings at the junior and senior high levels. Students and teacher attendance generally improved or stayed the same after implementation of YRE, as did standardized test scores. Student, teacher and community reaction to YRE shifted from neutral/somewhat unfavorable prior to implementation to somewhat favorable/very favorable subsequent to implementation. Among the respondents, the primary advantages of YRE were improved quality of education and decreased costs; the primary disadvantages were increased complexity of administrative and dealing with public objections.

Analyzing the financial implications of YRE is an important component of the District's evaluation of whether to transition to YRE. In formulating its decision, the District must weigh not only financial factors, but educational and social factors as well. We believe the information obtained from the benchmarking survey will provide valuable insight into the non-financial factors and will identify some of the "best practices" utilized by districts that have adopted YRE.

We wish to thank all of the Cypress Fairbanks employees and citizens who assisted us in the study. Their cooperation and input was invaluable to us.

If you should have any questions or require further information, please contact me or Melissa Becker at 237-2323. We appreciate the opportunity to have been of service to you and look forward to continuing this relationship.

Very truly yours,

ARTHUR ANDERSEN & CO.

By 

Richard W. Russler

Project Objectives

The primary objectives of this project were to:

- develop a financial analysis that compares a year-round multi-track educational program to a traditional educational program at the District;
- evaluate the information obtained from gathered data and interviews of the Enrollment and Growth Projections, Building Needs, Year-Round Implementation and Finance Committees and other relevant personnel;
- perform a five year analysis that compares the effect of the various alternatives on the District's tax rate;
- using the analysis described above, identify the most cost effective alternative for the District.

Background Information

In reviewing the experiences of other school districts, we found that there are several ways to analyze the impact of YRE. We believe the most reasonable method is to compare the District's current situation under a traditional calendar with a simulation of the costs under a year-round calendar. This approach holds constant the level of educational services offered (i.e., services offered after a change to YRE can increase or decrease as a result of policy decisions which were not the direct result of YRE; these optional changes are not considered in this model).

The three major types of costs included in most financial analyses of YRE, including ours, are:

* Capital costs--the estimated cost of acquiring the additional schools or classrooms which will be needed under the traditional program, and which will eventually be needed under YRE if enrollment continues to increase.

* Operating costs--the recurring expense of staff salaries and benefits, utilities, materials, equipment, maintenance, transportation, etc. Many of these costs are driven by the number of students rather than the number of buildings, and thus are largely independent of the type of scheduling used. In addition, some costs are significantly impacted by the number of buildings, but remain relatively constant or decline on a per student basis as the number of students in a particular school increases.

* Transition costs--the one-time expense of converting to a YRE program in one or more schools.

Virtually all studies of YRE agree that projected construction costs "avoided" by year round schooling are a primary source of savings under YRE. At the same time, total operating costs for a given school will always increase as a consequence of keeping schools open all year. The challenge is to determine whether operating costs will change significantly on a per student basis compared to a traditional program . In other words, we know that total capital and operating costs will increase because enrollment will increase, but will the increase be more under traditional schools or under year-round schools?

Transition costs can be categorized as (1) additional effort required to implement and (2) actual out-of-pocket costs. Clearly, any change requires effort, and, based on our interviews with the pilot schools, review of YRE literature and the responses from the benchmarking survey, transitioning to YRE is no exception. However, our financial model includes only actual out-of-pocket expenses which Cy-Fair could reasonably expect to incur if it chooses YRE. These include primarily communication costs and the cost of purchasing portable carts for storage of supplies during the teachers' intersessions.

Our analysis of the financial impact of the YRE program reports differences in the costs of allocating the same resources and services to the same student population over the same period under the alternative schedules. In the case of Cy-Fair, costs under the traditional schedule are the historical costs incurred by the District, modified for expected increase in student population, projected construction needs, inflation and other factors. Costs under the YRE schedule have been estimated based on reasonable projections and the experiences of other schools as well as the two Cy-Fair pilot schools.

Overview of Findings

* Total potential estimated savings under YRE over five years of $37,790,000. Effective management is a critical component of an efficient transition to YRE. A well-managed school district will have more savings under YRE than the average for all school districts. Conversely, if the District makes operational changes or takes other actions which invalidate the assumptions used in this model, the savings could be less.

* Annual district-wide savings per pupil from YRE of $177 in 1997-98.

* More than 95% of these savings resulted from more efficient use of classrooms and schools (avoidance of construction). Since the multi-track schedule increases the maximum student capacity of a school, overcrowding would be eliminated without having to construct new classrooms; consequently, an average of $7,182,400 per year of construction costs could be avoided during the five year time frame included in this study. The savings by year vary widely based on the number of schools avoided each year.

* Annual operating costs at Cy-Fair would be more than $3,279,000 lower over five years under the YRE program than the traditional program. Our model includes only those operating costs which would differ significantly on a district-wide basis under traditional and YRE programs, including certain payroll costs, utilities and custodial costs. Costs which would remain the same in total under either program were excluded.

* Transition costs, the final cost component, may accompany the implementation of a YRE program. Based on the experiences of the District's two pilot elementary schools, transition costs were minimal. However, to make the model conservative relative to this issue, we have estimated total transition costs of approximately $50,000 per school, which includes communication costs and portable storage carts.

* These factors combine to decrease the District's tax rate by an average $0.404 per $100 of property value over the five year period studied. This is equivalent to $404 for a $100,000 house over five years.

* In the first five years, approximately 50% of the savings due to YRE are based on the conversion of 4 high schools to YRE in the 1995-96 year. Without the conversion of high schools, the savings would be approximately $19,000,000 less over the five years.

* Not included in this model are savings from avoiding the building of a new bus barn, which, according to Cy-Fair personnel, would not be required under YRE due to more efficient utilization of existing buses.

* The model we prepared covers only the next five years. If the District continues to grow, the savings per year would be larger in years six through ten, as the District fills its capacity.

* We believe that the management style required of school administrators under YRE will be different than that required under a traditional calendar. The traditional peaks and valleys will be replaced by a more even but higher-intensity flow of work. We suggest that, should the District decide to adopt YRE, it should consider providing some management training to key administrators to assist them in meeting the demands of the new schedule.

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CAPITAL COSTS

ASSUME ANNUAL CAPITAL COST = $600 MILLION

COST ITEM	SYSTEM COST	AVERAGE DISTRICT COST
Annual interest (8.5%)	$51 million	$680 thousand
Annual principal (8.0%)	$7.6 million	$101 thousand
Annual cost for 1 year of $600 million	$58.6 million	$781 thousand
25 year cost for 1 year of $600 million	$1.5 billion	$19.5 million
25 year cost for 25 years of $600 million	$37.5 billion	$488 million

CONCLUSION

THERE ARE ENORMOUS SAVINGS TO BE MADE

	ANNUAL	TOTAL
At 1 %	15 million	375 million
10%	150 million	3.75 billion
20%	300 million	7.5 billion
50%	750 million	18.75 billion

Personnel Costs

PRINCIPALS AND SCHOOL-LEVEL CLASSIFIED STAFF

YRE principals, secretaries, clerks, cafeteria and custodial staff must extend their work-year from 10 or 11 months to 12 months with a proportionate increase in salary.

In addition to the extended work-year cost, 12-month staff, normally entitled to a month of vacation each year, will require a replacement/substitute when vacation days are taken. Typically, a school maintaining a 4-track YRE calendar has students in attendance for approximately 242-245 days each year; a 12-month principal or secretary would normally have a work year of approximately 225 days.

Since 12-month staff will not be on campus for about 20 days of each instructional year, the need for administrative and service support will incur an expense for replacement/substitute assistance.

NURSES, PSYCHOLOGISTS, CATEGORICAL/COMPENSATORY, SPECIAL EDUCATION AND RELATED SUPPORT STAFF

Since personnel in these categories are normally provided to the district or school in direct proportion to the eligible student population, YRE does not incur an excess cost. To assure that these support services are appropriately provided to students throughout the 12-month calendar, YRE staff may have flexible/modified work year assignments.

EXTENDED WORK-YEAR FOR CENTRAL OFFICE STAFF

While most central office staff in Oxnard, as is the case in most districts of similar size and larger, normally have 12-month assignments, those who did not are presently doing so. Oxnard did not add staff at the central office due to YRE. Because of California's tight financial condition, Oxnard presently has 2 fewer administrators and 6 fewer secretarial/clerical staff than maintained by the district when YRE began in 1976. The district is able to accommodate a reduction in clerical staff in part because attendance accounting is accomplished through a districtwide computer system. Computer systems also provide a wide assortment of other services previously supplied by "staff-power."

An evaluation of year-round schools conducted in 1989 by the Utah State Department of Education and Brigham Young University, and similar cost studies in California, have found that overall per student personnel costs for YRE schools are not markedly different than prior to the implementation of the program.

In practice, the inauguration of a new multi-track year-round program may generate additional classroom space and provide opportunities for a reduction in the pupil/teacher ratio, new programs and services, including a computer lab or media center. If YRE is used to reduce class size or to generate space for a library or computer lab, this becomes a program enhancement and should not be calculated as an excess cost attributed to the YRE program.

> The long summer vacation from school is an anachronism. The traditional academic calendar made sense for an agricultural society where children were needed for planting in the spring and were free to return to school after the harvest in the fall. But we are no longer a nation of farmers and the year-round schedule better serves the needs of modern society. Research has consistently shown that children lose ground in their educational achievements during a two- or three-month gap in instruction.

Reduced Student Absenteeism

In a four-year study of student absenteeism beginning with the 1981-82 school year and ending with the 1985-86 school year, Oxnard's YRE students averaged fewer days of excused and unexcused absence than students enrolled in the traditional program.

STUDENT ABSENTEEISM
Oxnard School District

	Excused (Funded)	Unexcused (Unfunded)
● Traditional	10.8 days	3.4 days
● YRE students	8.8 days	2.3 days

During this period, California's average, K-8 rate of excused absence was 10.8 days/year with 3.6 days/year of unexcused absence.

Since schools are funded for Average Daily Attendance (ADA), it is financially advantageous to maintain the highest rate of pupil attendance possible -- with the lowest rate of unexcused absence.

Attendance records have indicated for many years that **2%** to **3%** of Oxnard's enrollment, primarily Hispanic students (**73.6%** of the district's total enrollment), join relatives in Mexico or the Southwest for a period of 4 to 6 weeks during the Winter Holiday. Since this is not a peak harvest period for local crops, many Hispanic families have had a long tradition for an extended vacation at this time of year.

YRE provides a unique opportunity for accommodating these vacation absences; Track B typically has a scheduled/intersession vacation break from December 23 through February 2, and Track C has a vacation/intersession break from November 23 through January 1.

Since many of these families are normally involved in various forms of farm labor during the summer, it is not inconvenient for them to have their children in school until the end of July.

YRE, therefore, has provided a major benefit for the students and the school district: a placement on either YRE track B or C provides the potential for a full 180-days of instruction and the District benefits financially from the increased days of student attendance.

Reduced Teacher Absenteeism

The average annual rate of teacher absenteeism during a 4-year period (1981-82 through 1985-86) when the Oxnard School District maintained both traditional and YRE classes indicated that teacher absenteeism was reduced in YRE schools.

● Traditional Teachers:	Average 6.4 days/year
● YRE Teachers:	Average 5.5 days/year

Maintenance Costs

Schools which operate on a YRE multi-track schedule for **240-245** days each year -- essentially every weekday in the 365-day calendar, excluding weekends and holidays -- must be provided the same level of maintenance service as available to schools operating on a traditional September-June school calendar.

Providing such service, however, demands a significant change in the manner in which maintenance work is provided. With no "down-time" during the traditional summer, winter and spring breaks, maintenance projects such as remodeling, carpet and floor tile replacement, painting, plumbing and electrical repairs, resurfacing of asphalt playgrounds, reroofing, and similar work must be completed on a continuing basis throughout the 12-month calendar at times when such work will not disrupt teachers during the instructional day.

As the Oxnard School District made its complete transition from a traditional to a YRE school schedule, there was no increase in maintenance personnel -- all such staff, however, have been assigned to a 12-month workyear. For the past 16 years, the Oxnard School District has provided a quality maintenance program for its YRE schools, but not without a major restructuring of the delivery system.

Many of the major maintenance projects, including exterior and interior painting, are done by contractors through a competitive bidding process. Prior to YRE, the district employed three painters; today, only one remains. Currently, contractors with crews of 12-15 painters complete their work after the instructional day and on weekends. As a result, schools are more frequently painted and at less cost than a 3-painter staff could provide.

Just as hospitals, supermarkets and restaurants, which operate 7-days a week, 12-months a year, must schedule maintenance without operational disruption, schools can do likewise.

When a school is operational all-year long, facilities maintenance may create some unavoidable -- **but manageable** -- inconvenience. Resurfacing an asphalt play area may require the completion of such work in phases to assure some continuing access to the playground. Similarly, when waterlines need repair or replacement, such work is completed in increments and with the assurance that the basic, essential water needs of the school are available in some portion of the building.

Since a YRE school is operational for a period that is about **25% longer** than the traditional school year, it is reasonable to assume that the wear and tear and need for maintenance service would be increased proportionately.

Maintenance costs in Oxnard, Visalia and in a number of other YRE school districts have been determined to increase in a manner similar to that of utility costs. That is, the increased cost of maintenance at the year-round school results from the need to operate the entire school for an additional **55-60** days per year.

In order to evaluate the additional cost of a year-round school, a formula for maintenance costs was developed by the **Visalia Unified School District**. It should be noted that while the cost of maintenance increases when the schools operational year is extended from 185 days to 240 days, the "Maintenance Cost Per Square Foot Per Day" remains the same.

"People very frequently don't know what they want until they see what they don't want."

MAINTENANCE COSTS IN A TRADITIONAL AND YRE SCHOOL
Visalia Unified School District

Annual Days of Operation		Maintenance Cost Per Sq. Ft. Per Day		Total Sq. Ft. In School		Annual Maintenance Cost
			Traditional School			
185	X	.006947	X	25,960	=	$33,364
			Year-Round School			
240	X	.006947	X	25,960	=	$43,283

There has also been a significant reduction in burglary and vandalism loss/cost during the past 16 years at Oxnard's YRE schools. Prior to the 1976-77 school year, the District had been experiencing an annual loss of about **$80,000** due to burglary and vandalism. In more recent years, such losses have ranged from **$10,000** to **$20,000** per year.

This reduction in burglary/vandalism/graffiti expense can reasonably be attributed to the fact that school custodians are now assigned at YRE schools until midnight each school day, 12-months a year. Oxnard's schools are no longer attractive targets for the type of mischief which was commonplace when buildings were unoccupied from June to September.

When the increased student enrollment and the increased number of school days are factored with the annual cost of maintenance, it has been generally found that maintenance costs have not increased significantly because of YRE.

Grounds Maintenance Costs

Except as required for new school sites within the Oxnard School District, YRE has not incurred a need to increase the assignment formula for grounds maintenance staff. Since the need to maintain school grounds and landscaping has always been a year-round responsibility, grounds staff have normally held 12-month work assignments.

With school grounds incurring heavy, year-round use, the district has recognized the convenience and cost-effectiveness of an automatic irrigation system which operates only at night or on weekends with no disruption to the school's operation.

In order to get maximum utilization of grounds staff, some are assigned to a Tuesday-Saturday work-week. Such a schedule more easily accommodates necessary fumigation, pesticide application and fertilization, including disruptive mowing adjacent to classrooms.

Experience has indicated that where certain play areas are heavily used year-long, the turf may need renovation and a "breather." In such cases, school staff is called upon to rotate play areas which incur a concentration of student activity.

Custodial Costs

Like maintenance services, the continuous, multi-track year-round schedule requires a new set of techniques and strategies to assure a cost-effective and efficient custodial program.

No longer can deep-cleaning be scheduled for the summer months and the spring and winter breaks: these breaks no longer exist.

Prior to YRE, the Oxnard School District assigned custodial staff to schools based upon a custodial staffing allocation formula which considered area measurement, the cleaning tasks, the number of staff and other unique characteristics of a school.

This custodial allocation formula did not change when YRE was implemented; custodial staff, however, had their duty year extended in all instances to 12 months. The duty day of the custodial staff also changed: each school was assigned one day custodian, possibly two depending upon school size; all others had daily assignments extending from 3 PM through midnight each day.

To assure a consistent, quality cleaning schedule in YRE schools, the district has implemented a **"block-cleaning plan"**. Block cleaning has been an effective, flexible solution for both routine and deep cleaning in a YRE setting when schools are almost never closed.

Except for the day custodian, whose work schedule remains essentially the same as during the traditional school year, night custodians are assigned to an area of the school campus which is divided into four blocks -- A, B, C, and D. Within each block some "cursory" tasks are completed daily, including thorough cleaning of restrooms, cafeteria/kitchen area. All other "detail"/deep-cleaning tasks, such as stripping and waxing floors, shampooing carpets and window washing, are completed by a block rotation schedule on a weekly, monthly or quarterly basis.

The district's 12-month custodial staff is presently serving up to one-third more students at their schools with a quality of service which is as high, if not higher, than previously provided in the traditional year format.

The district has determined that the cost for custodial services (personnel and supplies) per student per year for the YRE program is essentially the same as it was for the traditional school-year program.

Utility Costs

During the years when the Oxnard School District maintained both traditional and YRE schools, utility cost comparisons indicated that the annual cost increase for all utilities in YRE schools was directly proportionate to the 60-day increase in a school's operation.

A similar finding was determined in a statewide evaluation of year-round schools completed in 1989 by the Utah State Office of Education.

In a comparison of YRE and traditional schools, the Utah study found that "per student utility costs are roughly constant."

One of the most comprehensive analysis of utility costs in the traditional and YRE schedule has been conducted by the Visalia Unified School District. This study determined the "Combined Utility Cost Per Square Foot Per Day" to be **$.0053216.** the "Annual Combined Utility Cost" for a **25,960** square foot elementary school operating a 185-day traditional school year was **$25,558**. When the same school operated on a 240-day YRE schedule, the only difference in the "Annual Combined Utility Cost" was a proportionate cost increase resulting from the addition of 55 days of school operation.

UTILITY COSTS IN A TRADITIONAL AND YRE SCHOOL
Visalia Unified School District

Annual Days of Operation		Combined Utility Costs Per Sq.Ft. Per Day		Total Sq. Ft. In School		Annual Combined Utility Cost
			Traditional School			
185	X	$.0053216	X	$25,960	=	$25,558
			Year-Round School			
240	X	$.0053216	X	$25,960	=	$33,156

Transportation Program Costs

While Oxnard's transportation-related costs, salaries, equipment and lease agreements, have incurred the normal inflationary increases over the years, YRE has not caused an increase in the daily cost of transporting a student to and from school.

If all **2,700** transported students in the Oxnard School District required bus service from September through June, **36** buses would be required. When these students are spread through 12 months, only **30** buses are needed. Since it costs **$50,000** to operate a bus for a 9-month school year, 6 fewer buses ($300,000) covers the expense for maintaining bus services during June, July and August. During the 1990-91 school year, Oxnard's student busing cost totalled $1.9 million -- or **$2.93 per student per day**. If the district bused all 2,700 students during a 180-day traditional school year, the cost per student per day would remain essentially the same.

Data derived from an analysis of transportation costs in the Visalia Unified School District revealed that these costs, as in Oxnard, remain constant in both the year-round and traditional school settings.

Visalia transports an average of **5,060** students each day and has a total enrollment of **18,252**. An average of **27.7%** of the district's enrollment is transported daily. The daily cost of transporting one student is **$1.8618**. The following chart demonstrates that transportation costs will remain essentially constant in either a YRE or traditional school setting.

PAY NOW; PAY LATER

"If we don't pay now, we'll pay later on for the social and economic fallout that will result if we fail to meet the educational needs of all children."

Ernest Boyer, President
Carnegie Foundation for the
Advancement of Teaching

TRANSPORTATION COSTS FOR A TRADITIONAL AND YRE SCHOOL
Visalia Unified School District

% of Students Transported		Daily Attendance		Annual Days of Operation		Cost Per Student Transported		Annual Transportation Costs
				Traditional School				
.277	X	600	X	180	X	$1.8618	=	$55,698
				Year-Round School				
.277	X	450 (600 x .75)	X	240	X	$1.8618	=	$55,698

It should be noted that in Visalia's year-round program, only 75% of the students attend school at any given time.

This study indicates that the cost of transporting students is the same in both settings due to the reduced number of students being transported at any time. The rate of reduction in the number of students being transported on a daily basis is equal to the increased number of days of operation.

Cost of Maintaining the School Lunch Program

The Oxnard School District maintains a school lunch program which is "cost-efficient" from funds of the cafeteria account. A full program of cafeteria services is provided throughout the 12-month calendar when students are present.

Lunches cost $1.50 for students at all grade levels. When Oxnard's schools were converted to YRE with an average 20% increase in student enrollment, a school's cafeteria staff generally remained the same with a workyear extended to 12-months. While food costs and labor costs have increased over the years, YRE has not contributed to an increase in lunch cost nor has the labor cost per lunch increased as a result of YRE. About **1/2** of the cost of a student lunch has consistently been labor; during the 1991-92, school year, the labor cost per meal is **76 cents**. Oxnard, like most California districts, does not supplement the Cafeteria Account from the General Fund budget. The cost of a school lunch (labor, utilities, food and supplies), should not be any greater in a YRE program than in a traditional schedule. The cost for producing a student lunch, likewise, shouldn't vary significantly for a group of 500 or 2000 students, or whether those lunches are served in September or July.

To assure that the school lunch program is cost-efficient and self-supporting, it is important that the proportion of the cost of a lunch assigned to labor, food, serving supplies, utilities and equipment expense be monitored carefully.

REPLICATE WHAT WORKS!

Material and Supply Costs

Since classroom materials and supplies are generally based on a dollar value per student, they remain constant in the year-round and traditional schools as long as the student population is equal in both school settings.

Oxnard and other YRE districts; however, are experiencing a significant cost savings generated from a more efficient use of texts, and the related "tools" of instruction.

When 4 classes occupy 3 classrooms on a rotational basis, there is no need for a full, fourth complement of reference and library materials, maps, globes, science kits, classroom computers, other instructional equipment, including textbooks.

YRE Mobile Storage Cabinets

A one-time cost associated with the implementation of a multi-track YRE program is the acquisition of mobile storage cabinets. To assist teachers and students with the storage and movement of their personal gear, such as workbooks, crayons, pencils, etc., each YRE teacher should be provided with a mobile storage cabinet which can be moved from the classroom to a holding area at the school when the class is on vacation/intersession. These cabinets must be of sturdy construction with "industrial-strength" casters to withstand the jarring which typically occurs when the cabinets are moved over doorway thresholds. Cabinets used in the Oxnard School District are 55" high x 28" deep and 48" long with a 1000 pound load capacity -- and are commercially-acquired at approximately $600 each.

PRISONS OR SCHOOLS?

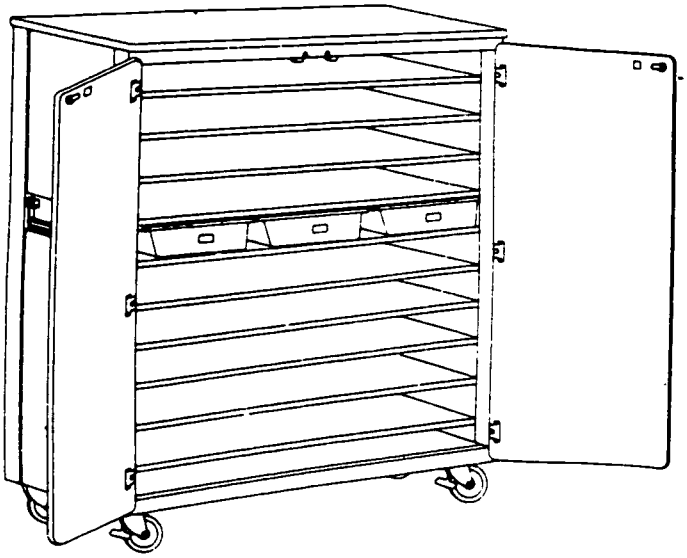
"We are forty-third out of fifty states in the amount we spend on public education.

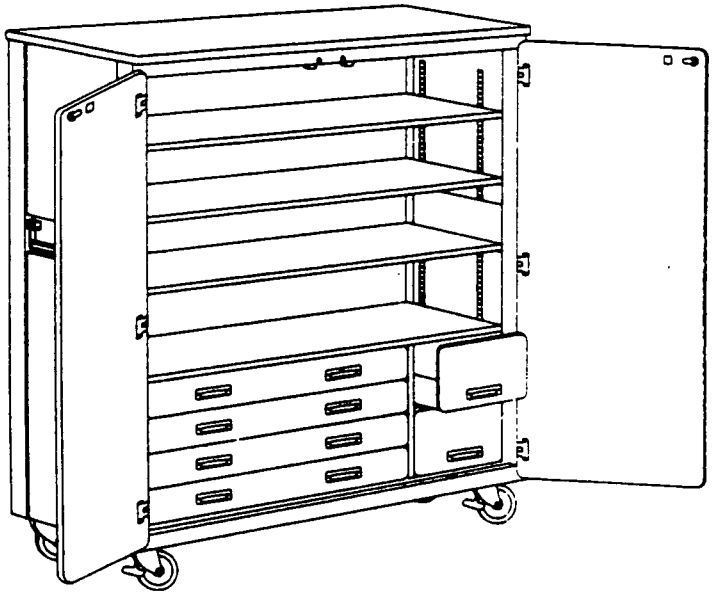
"We are fourth out of fifty states in the amount we spend on criminal justice.

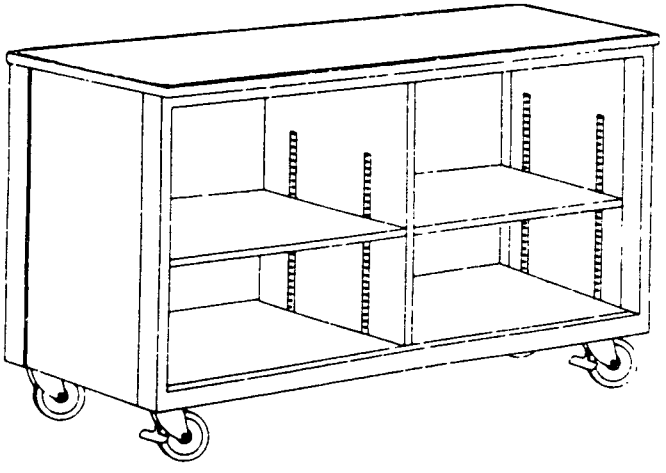
"If we invest in education, we might need less funding for criminal justice."

California Assemblywoman Delaine Eastin
Sacramento
March 6, 1990

YEAR-ROUND CLASSROOM CABINETS







OPERATIONAL COSTS SUMMARIZED

When all the costs associated with an extension of a school's operational year by 60 days are totalled (assuming there is no padding of programs and service beyond those provided in the traditional school year) and that dollar amount is divided by the increased enrollment count, the operational costs for a multi-track YRE school should be equal to or less than comparable traditional year **costs per student per year -- if the capacity usage of the school is at 115% or greater than permitted by the traditional school calendar.**

There is no meaningful value in a comparative analysis of the operational costs of YRE and the traditional school year which is not based upon **increased capacity usage** and the **cost per student per year** for comparable services/programs.

Of course multi-track YRE costs more when a school is loaded to its capacity and operates on a multi-track calendar 240-245 days a year, but on a **cost per student per year basis** -- which is the only legitimate cost comparison -- YRE has been proven time and again to be cost-effective.

YRE MAY ALSO BE A MEANS TO ADDRESS ANOTHER NATIONAL CRISIS: STRUCTURALLY UNSOUND, UNSAFE, OBSOLETE SCHOOL BUILDINGS

"Wolves at the Schoolhouse Door, An Investigation of the Condition of Public School Buildings," a shocking report published in 1989, found that a quarter of the nation's school buildings are structurally unsound and a threat to children's safety and more than half are in such poor condition that major repair cannot be overlooked much longer.

One-fifth of the nation's schools were constructed more than 50 years ago, the study found. Nearly two-thirds were built in the 1950s and 1960s, "generally a time of rapid and cheap construction .... Many construction experts say the buildings were intended to last only about 30 years. If so, their time is up."

The replacement cost for these sub-standard school buildings has been estimated at **$422 billion.** In addition, there is a need for **$84 billion** in new or retrofitting construction and **$41 million** in maintenance and building repairs.

A study released in November, 1991 by the American Association of School Administrators, **"Schoolhouse in the Red: Cutting Our Losses,"** shows nearly 5 million students attend class in 13,200 schools with structural and environmental hazards, substandard mechanical systems and suffering from old age.

The same study indicated that the deferred maintenance price tag for schools keeps growing. It was **$25 billion** in 1983, **$41 billion** in 1988, and has grown to **$100 billion** in 1991.

There is an increasing national consensus that the condition of our capital infrastructure -- our school buildings -- is being totally ignored.

While there is no question that the acute shortage of funds to build new schools for our burgeoning student population is a national crisis of the **first order**; the fact that one-quarter of our nation's schools are in a **state of arrested decay** simply has to be a national crisis of the **second order**.

It is entirely possible that some districts with such unsafe, unsound and obsolete school buildings might retire such facilities and accommodate their students in more adequate schools with enhanced capacity made possible by a multi-track YRE program.

REDUCING CLASS SIZE WITH YRE

While a multi-track YRE program is usually implemented in districts with a need to generate additional enrollment capacity, the program can also be utilized to reduce class size without creating a need for additional classrooms.

For example, in a typical situation, a school designed for 24 pupils per classroom was overcrowded with an average of 32 per class. Going "60-20" made it possible to cut the class size back to the more desirable 24 pupils without constructing new additions or a new school.

While capital costs can be avoided in this example, instructional costs, i.e. additional teachers, will escalate from the 32-to-1 the more expensive 24-to-1 base. The year-round plan did not create the increase in instructional costs, but merely made the improved pupil-teacher ratio possible.

UTILIZING YRE TO REDUCE CLASS SIZE WITHOUT GENERATING A NEED FOR ADDITIONAL CLASSROOMS

A Theoretical Example

TRADITIONAL K-6 SCHOOL

1. Number of Students: 672
2. Number of Classes/Teachers: 21
3. Average Class Size: 32
4. Number of Classrooms Needed: 21

	K	1	2	3	4	5	6	Total
Classes	32 32 32	32 32 32	32 32 32	32 32 32	32 32 32	32 32 32	32 32 32	224 224 224
Total	96	96	96	96	96	96	96	672

YRE (4-TRACK) K-6 SCHOOL

1. Number of Students: 672
2. Number of Classes/Teachers: 28
3. Average Class Size: 24
4. Number of Classrooms Needed: 21

		K	1	2	3	4	5	6	Total
Classes/ Tracks	A	24	24	24	24	24	24	24	168
	B	24	24	24	24	24	24	24	168
	C	24	24	24	24	24	24	24	168
	D	24	24	24	24	24	24	24	168
Total		96	96	96	96	96	96	96	672

$400 MILLION TO REDUCE CLASS SIZE BY ONE STUDENT

Senator LeRoy Greene: California

- We must replace 2% of all the facilities every year just to cover our present school population. When we add in the growth, we will need approximately $2.3 billion per year and the maximum we have had is $800 million.
- Senator Greene also noted the cost of $400 million to reduce class size by one student in each classroom statewide. He felt we needed to provide opportunities for local communities to get back in the picture. The State cannot provide all the funding necessary and local communities will have to assume more of that responsibility.

ACSA STATE SUPERINTENDENCY COMMITTEE
November 1, 1990
ACSA Office - Sacramento

YEAR-ROUND SCHOOLS

AN EDUCATION PROGRAM
NOT JUST FOR SPACE
BUT
SPACE-AGE LEARNING

THE STATE'S INTEREST IN YEAR-ROUND SCHOOLS

California Governor Deukmejian on YRE

In a strong statement on year-round education, Deukmejian said, "First, we will provide strong financial incentives to districts which adopt a year-round school program, including special per student payments and first-call on school construction bond funds. **It is simply inexcusable and wasteful to allow school facilities to sit idle and unused for up to three months per year.**

The California legislature has indicated that the state's primary interest in year-round education is its potential for reducing school districts' demands for limited state resources to construct new school facilities. Year-round school provides a more intensive use of existing facilities, thereby expanding the capacity of a school site, and commensurately reducing the need for new facilities. In approving AB 87 (YRE Incentive Funds) in 1990, the Governor and legislature have stated with a significant financial commitment that YRE should be an essential component of any state program to assist school districts in meeting their school facility needs. This legislation provides funding to YRE schools in three categories: (1) Air conditioning, (2) Implementation/Planning Grants, and (3) Operational Grants.

While the air conditioning and implementation/planning grants are critically important one-time grants for districts preparing for the implementation of multi-track YRE programs, the operational grants are non-competitive, continuing incentives for districts which can meet three criteria: (1) document substantial projected overcrowding, (2) commit to the operation of a multi-track YRE program to increase the capacity of the district, and (3) be eligible for state construction funding if it was not operating on a year-round basis.

AB 87: YRE Operational Grants

The amount of the YRE Operational Grant is equal to: (a) the number of excess pupils housed at a school beyond its traditional-year capacity; times (b) the assumed state cost avoided per pupil of $1,151 (construction, land, including relocating expense, and interest saved by the State in bond revenues); times (c) 50%-90%, depending upon the percentage of pupils certified to be in excess capacity.

% of Pupils Housed in Excess of a School's Capacity Based upon State Loading Standards	% of Payment	"COST AVOIDED" per Excess Student	Funding per Excess Student
0 - 5%	0	$1,151	0
5% - 10%	50%	1,151	$ 575.50
10% - 15%	67%	1,151	771.17
15% - 20%	75%	1,151	863.25
20% - 25%	85%	1,151	978.35
25% +	90%	1,151	1,035.90

AB 87: YRE INCENTIVE FUNDING PROGRAM

[Approved by Governor September 22, 1990. Filed with Secretary of State September 25, 1990.]

AB 87, O'Connell (D-Carpinteria), was passed by the Legislature on a bipartisan vote and signed by the governor.

The measure deals with the Year-Round Incentive Payment Program and would appropriate $27 for the incentive payments. The bill would also:

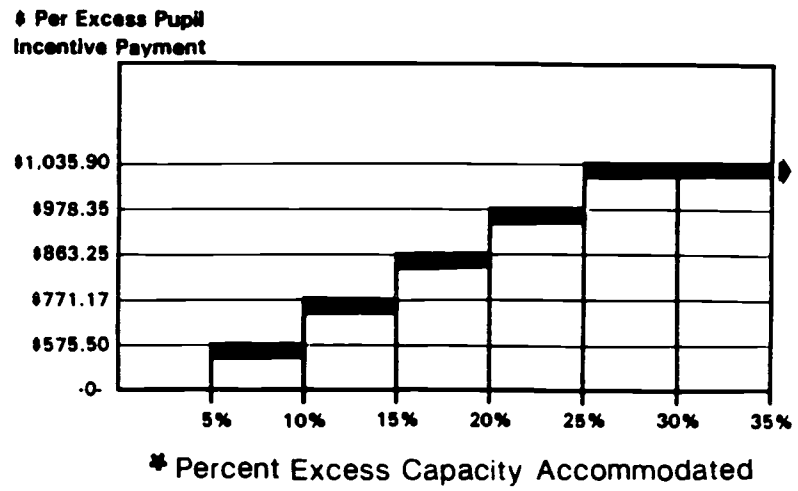
- Eliminate any "double-dipping" whereby school districts that received YRE incentive funding had been eligible to also receive state building funds for the same students.
- Establish the "costs avoided by not building a school" at $1,151 per pupil in excess of capacity, which would be recalculated in 1992-93 to reflect statewide average costs.
- Repeal the two existing YRE incentive payments, replacing them with two new grants for implementation and operation:

a) The implementation grant would be a one-time grant of $25 per pupil up to a maximum of $100,000 per school site for planning to operate a school site on a year-round calendar.

b) The operational grant would be based on a formula which calculates the district's share of the savings from its "costs avoided" based on the district's percentage of pupils housed in excess of capacity. A district with 5 percent excess would receive 50 percent, while districts with 25 percent excess would receive 90 percent.

- Allow districts to apply for funding for air conditioning in year-round schools in the year prior to operating on year-round. The June school construction bond reserved $40 million for air conditioning.
- Allow districts to be "held harmless" for the 1990-91 fiscal year, so districts would receive the same amount of funding they received in 1989-90. The new operational grant formula would be used to fund all sites which begin operating after 1989-90.

Relationship Between AB 87 (1990) YRE Incentive (Operational Grant) Payment and Level of Excess Capacity Accommodated *



* *Excess capacity accommodated:* The number of additional pupils accommodated in a school in excess of its traditional (nine-month calendar) capacity, expressed as a percentage of this traditional capacity.

COST AVOIDANCE WITH YRE: HOW MUCH?

Statewide Perspective

According to the California Department of Education, school districts applying for AB 87 operational grants have given up 52,980 square feet in construction eligibility in the State Building Program. A total of $49.7 million was apportioned for the 1991-92 school year to 37 districts for 272 multi-tracked year-round schools. **This is a significant amount of square footage which would have resulted in a need for 80 new schools and 800 acres of land if these schools were not using year-round calendars. The total state cost for these schools would have been nearly $500 million in 1992 dollars.**

In addition, 103 districts have applied for implementation funds for 1992-93 to convert 384 schools with 322,238 pupils to multi-track year-round calendars. **This is equal to an additional $500 million in school construction costs which the state will avoid if all of these schools are converted.**

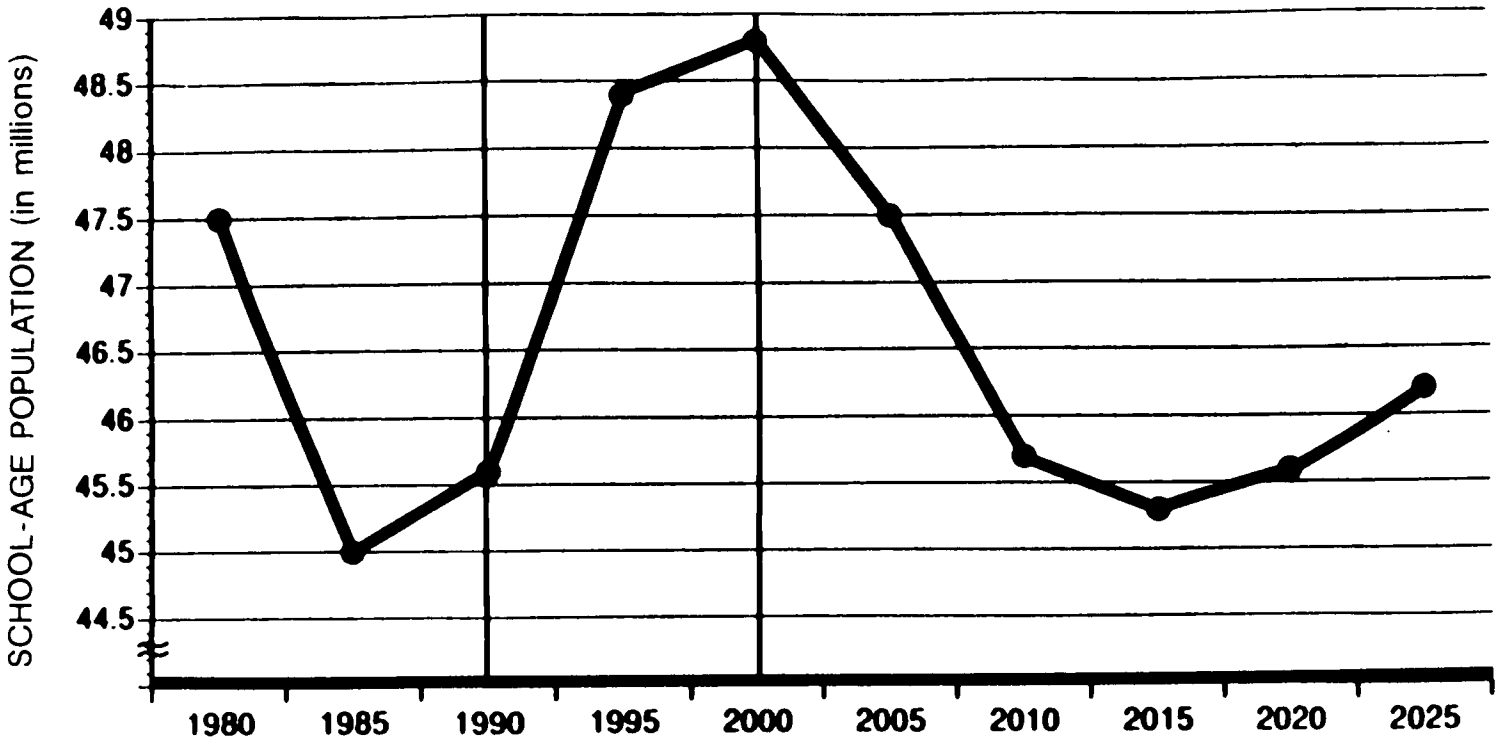
Y.R.E. LETTER
Post Office Box 15204
Sacramento, CA 95851-0204

May/June, 1992

"IF WE'RE DOING IT THE WAY WE'VE ALWAYS DONE IT, WE'RE DOING IT WRONG."

CHARLES KETTERING

Estimates and Projections of the Total School-Age Population of the United States for Selected Years: 1980 to 2025



Sources: Statistical Abstract of the United States 1989;
U.S. Bureau of the Census, "Current Population Reports" 1989

STANDARD & POOR'S CREDITWEEK MUNICIPAL

MARCH 21, 1994

YEAR-ROUND EDUCATION'S IMPACT ON SCHOOL DISTRICTS

Faced with limited capital budgets and voter unwillingness to raise taxes to support new school building bond issues, many school districts are turning to year-round education as a way to deal with overcrowding. Texas is the latest state in which a major school district plans to implement year-round education, which already is prevalent in California and Florida.

Cypress-Fairbanks ISD, Texas is the state's fifth-largest school district. The school district's recent bond authorization is now $61.7 million under year-round education, as opposed to $106.3 million if the traditional school year calendar had been maintained. The district plans to sell the first installment of these bonds on March 21.

S&P's decision to raise the rating outlook on the district's unenhanced debt to positive from stable *(see rating analysis on page 37)* demonstrates the positive effect year-round education can have on credit quality. For Cypress-Fairbanks, as in other districts that have implemented year-round education, concerns related to growth pressures are mitigated.

WHAT IS YEAR-ROUND EDUCATION?

Under a year-round calendar, students attend school for the same number of days as students on a traditional calendar. However, the school year is reorganized so the standard instruction period of 180 days is distributed throughout the year, with regularly scheduled breaks or vacations interspersed. Educational instruction and vacations are organized into smaller segments throughout the year for more continuous learning and more frequent breaks. In the traditional school calendar year, students attend school for nine consecutive months (180 school days), followed by a three-month (60-school-day) vacation period.

In the most common year-round schedule, the 60-20 plan, students attend school for 60 days at a time and then go on vacation for 20 school days at a time until they have received 100 days of instruction. Students rotate through the year until they have each had three 60-day terms and three 20-day vacations.

Dramatic changes in U.S. demographics caused by the declining birth rate and the aging of U.S. population indicate that, despite the short-term spurt of rapid student enrollment growth that many school districts are experiencing due to the post-Vietnam War "baby boomlet," the long-term trend for student enrollment is negative. School districts that respond to temporary increases in enrollment by building the enormous amount of new schools needed to maintain the traditional school year calendar run the risk of costly overbuilding. Long after the increase in enrollment has passed, the community probably will still be paying off the bonds for the new school construction.

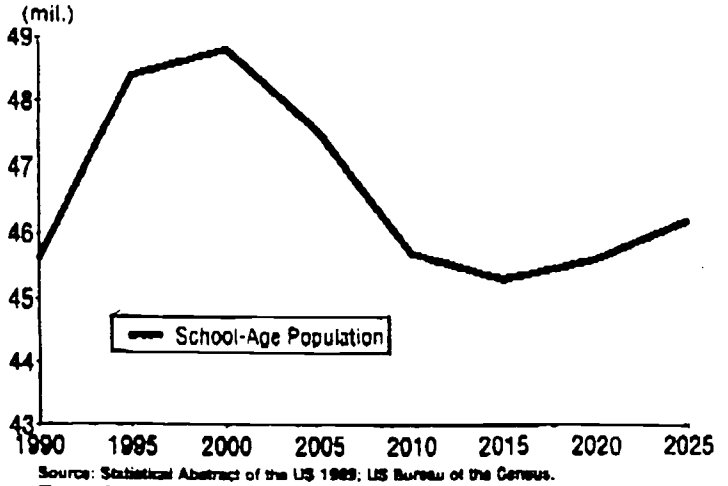
Although converting to a year-round calendar is not the only way to avoid overbuilding, the alternatives of using split sessions or portable facilities do not provide any of the educational benefits of year-round education.

SINGLE- AND MULTITRACK

There are two main types of year round education: single-track and multitrack. A single-track year-round calendar is the same as a traditional school year calendar in that the entire student population follows the same calendar with the same vacation periods. In both the traditional and the single-track year-round calendars all of the students are in school or on vacation at a given time. The only difference is that in a single-track year-round system, the 180-day calendar is organized with shorter, more frequent breaks throughout the year instead of one long summer break at the end. In both cases, the scheduled vacation periods when the school buildings are not in use represent wasted capacity.

While single-track year-round education has been shown to reduce the amount of learning loss that occurs during the longer summer vacation period associated with the traditional school year, it does not expand the school building's capacity. In both traditional and single-track year-round schools, the only way to expand capacity is to build. Therefore, single-track year-

TOTAL SCHOOL-AGE POPULATION OF THE U.S.



Source: Statistical Abstract of the US 1993; US Bureau of the Census. "Current Population Report."

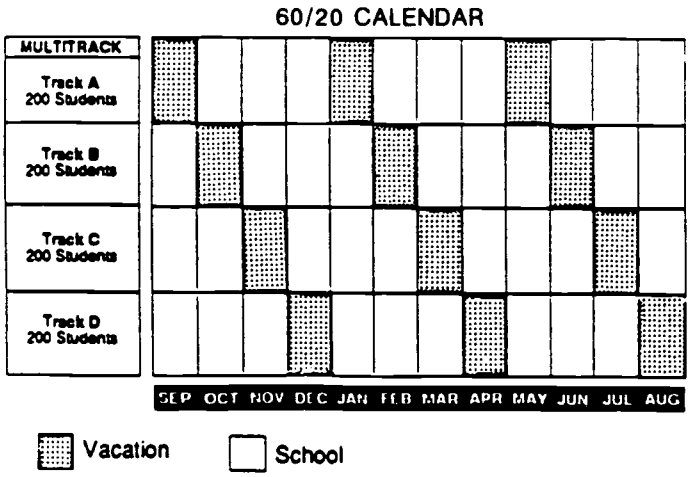
round education does not generate any savings in capital expenditures.

With a multitrack system, however, school districts can avoid the capital expenditures related to new construction by expanding the capacity of their existing buildings.

IMPACT ON CAPITAL EXPENDITURES

On a multitrack year-round calendar, students are organized into tracks with staggered instructional blocks and vacation periods. While one track is on vacation, another can use the vacationing track's space, thereby increasing the school's capacity. For example, a school built with a capacity of 750 students under a traditional school year calendar can accommodate 1,000 students by using a four-track schedule with 250 students in each track. Assuming a 60-20 schedule, each track attends school for three months, followed by a one-month vacation. While one track of 250 students is on vacation, the three other tracks are in school. As soon as the one-month vacation period is over for one track, it returns to school for three more months, while another track goes on vacation for one month. At any one time, 250 students are on vacation *(see chart)*.

Attendance Patterns
Traditional, Single-Track and Multitrack Calendar Programs
For A School Which Can Accommodate 600 Students At Any Time



By using the school building for 240 days out of the year instead of 180, the school district expands the school's capacity 33%. The implications of the space savings created by year-round education are dramatically illustrated in the case of Cypress-Fairbanks ISD's capital plan. Under a year-round schedule, the district will only need to build one additional building to deal with increasing student enrollment through 1998. Had the school district opted to maintain the traditional calendar, it would have had to build one high school, three elementary schools, one intermediate school, and one junior high school to keep up with the growth for that same period.

IMPACT ON OPERATING EXPENDITURES

While the reduction in capital expenditures under year-round education is obvious, the impact on operating expenditures is less evident. Clearly, the total cost of operating a year-round school is higher than the total cost of operating a traditional school due to the fact that the year-round school is serving more students. A school building in continuous use for 240 days a year serving 1,000 students will always incur higher total operating expenses than a traditional school operating only 180 days a year and serving only 750 students. Thus, a comparison of the total operating cost of these two types of schools would be misleading. The only true comparison would be based on per pupil costs.

An analysis of several year-round schools in California conducted by Norman Brekke, superintendent of the Oxnard School District in Oxnard, Calif., found that when a school reaches a multitrack capacity between 115% and 120% of its traditional year capacity, the operational cost per student reach a "break-even" point with the cost per student in the same school operating at capacity on a traditional calendar. This reduction in per pupil cost is a product of economies of scale.

It is important to note, however, that even in year-round schools that do not achieve savings in operating expenditures, the magnitude of the capital costs avoided far outweigh the modest increases in operating expenses.

CALIFORNIA'S INCENTIVE FORMULA

California leads the nation in the total number of students educated year-round, with over 1 million students enrolled in year-round programs. Because the bulk of construction money for schools comes from the state, it is in the state's interest to reduce the amount of new school construction. To do so, California offers overcrowded school districts financial incentives to switch to a year-round calendar. The amount of revenue a school district can receive from the state under this program depends on the level of overcrowding in the district.

To qualify for assistance under this program, a year-round school must be at least 5% over traditional capacity. Returning to the previous example, if a school built with a traditional school year capacity of 750 students is used to house 1,000 students, then the school is operating at over 33% of its original capacity. This scenario would qualify the school district for the maximum amount of aid allowed under the state's incentive program $1,035.90 per student for each of the 250 extra students it enrolls under the year-round calendar. This generates $250,000 of extra revenue for the school district. There are no restrictions on how the district may spend this additional revenue.

The amount of aid to which a school is entitled is equal to the number of students over the school's traditional capacity multiplied by the state's estimated cost avoided per pupil ($1,151 multiplied by a ratio of 30%-90%, depending on

the percentage of pupils over capacity. The state's estimate of cost avoided by year-round education is based on the cost of construction, land, and interest saved by the state in bond revenues. The table below illustrates the state's sliding scale for aid based on overcrowding.

SUPPORT FOR YEAR-ROUND SCHOOLING

While parents are divided in their support of year-round education, surveys have found that the longer it is in place, the more parents come to appreciate the educational benefits it has to offer. By reducing the length of vacation periods, the amount of learning lost during the traditional summer vacation is reduced, while the increased frequency of breaks during the year-round calendar reduces student and teacher "burnout."

California's scale for aid to schools based on overcrowding

% of students housed in excess of traditional capacity	Payment (%)	x	"Cost avoided" per excess student ($)	=	Funding per excess student ($)
0 to 5	0		1,151		0
5 to 10	50		1,151		575.50
10 to 15	67		1,151		771.17
15 to 20	75		1,151		863.25
20 to 25	85		1,151		978.35
25 or more	90		1,151		1,035.90

Source: Norman R. Brekke, School Business Affairs: *The Professional Journal of ASBO International*, May, 1992.

Scheduling problems also begin to subside as the providers of children's traditional summer recreational activities begin to adjust to the new schedule by providing alternative activities throughout the year. Some parents enjoy the additional flexibility year-round education provides them in planning family vacations during the more inexpensive, off-peak seasons.

Many educational leaders are strong supporters of year-round education because of the educational benefits it provides. Not only does it reduce summer learning loss, but the increased frequency of breaks allows teachers greater opportunities to provide remedial help for students who are falling behind. Finally, year-round education also reduces teen vagrancy and school vandalism during the summer months.

Business organizations, which typically hold fiscally conservative beliefs, generally support year-round education because it keeps taxes low. In Collier County, Fla., the local chamber of commerce proposed year-round education, although its efforts have been blocked to date by the school board.

Two other natural allies of year-round education are retirees and taxpayer groups. Retirees on fixed incomes whose children are no longer enrolled in the school system view year-round schooling as a way to keep taxes low without harming the quality of education. The large population of retirees in Florida, which makes up a powerful voting block, may help explain why Florida has the third-largest number of students (82,196) in the country enrolled in year-round schooling.

OPPOSITION TO YEAR-ROUND EDUCATION

Despite proven savings in capital expenditures, year-round education faces significant opposition in many communities. This opposition consists of several groups, including parents, local real estate developers and construction contractors, and school administrators.

Parents may oppose year-round education for a variety of reasons. For working parents, year-round education sometimes creates problems in arranging for day care during the more frequent school breaks. Year-round education also may complicate the scheduling of family vacations if siblings are on different tracks. Traditional summer activities for children, such as summer camp, may be disrupted due to the change in scheduling.

But parental concerns are not limited to scheduling issues. Since the goal of year-round education is to reduce the need for new school construction in rapidly growing areas, many children living in the more recently developed outskirts of town are forced to commute longer distances to attend school in the heart of the city, where most existing facilities are located. Parents of young elementary school age children may dislike the idea of their children attending school so far away.

This concern is echoed by real estate developers, who often use the presence of a "neighborhood school" as a selling point for new developments. Opposition also may arise from contractors in areas with sluggish economies, who often see the building of new schools and other public works projects as a way to revive their industry. These elements came together to overturn year-round education in the case of Jefferson County, Colo. after 14 years of successful implementation. According to the district's former superintendent, the opposition was led by a group of new parents in the school district, which had joined forces with the local real estate developers and construction contractors during a period of depressed economic activity in the late 1980s. The reversal of year-round education required a sharp increase in taxes to pay for the construction of the large number of new school buildings needed to convert the district back to a traditional calendar.

Another obstacle to the implementation of year-round education is what Dr. Charles Ballinger of the National Association for Year Round Education refers to as the "edifice complex" among school administrators. In many cases, school superintendents and board members view school buildings as living memorials to the school administrators who were in office at the time the new schools were built. New buildings are an easy and tangible way to demonstrate one's commitment to education.

LIKELY TO SPREAD

Given the significant savings generated by year-round education, it is not surprising that the number of schools adopting year-round calen-

dars has grown so rapidly in recent years. The number of students enrolled in year-round schools has increased over 170% since the 1989-1990 school year, from just 520,323 students to over 1.4 million students in the 1993-1994 school year. The number of schools on a year-round calendar has jumped to 1,913 from 618 during the same period.

The implementation of multitrack year-round education to avoid capital expenditures can clearly have a positive impact on the credit quality of school districts facing mounting growth pressures. But while cost savings are an important factor, it is important to note that a large percentage of school districts opt for year-round education solely for the educational benefits it provides. As illustrated earlier, the single-track calendar does not generate any savings in capital expenditures, yet of the 1,949 schools operating under a year-round calendar in the U.S., 41% are on a single-track schedule. In the long run, it may be the educational benefits of year-round education—not necessarily its positive credit implications—that will cause it to continue to spread.

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----- THE BIG PICTURE -----

ADVICE TO EDUCATORS: FOLLOW CUES FROM CORPORATE WORLD

Business as usual is no longer an option for public schools nationwide, according to BUSINESS WEEK (Mandel, Melcher, Yang and McNamee, April 17). Public education is faced with unexpectedly high enrollments and ever-tightening budgets. One result: a rise in student-teacher ratios, the first in the postwar era, notes the magazine. And the squeeze is only going to get worst, warns BUSINESS WEEK.

Schools primarily are responsible for their own financial woes, according to BUSINESS WEEK. Bruce Cooper of Fordham U asserts that only 52% of every school dollar makes it to the classroom in the typical large school district. U of Rochester's Eric Hanushek agrees: "What we do know is the problem of inefficient use of resources seems to be everywhere."

BUSINESS WEEK contends that public education must follow the lead of the business world where corporations "have become more productive by getting rid of needless layers of management and focusing instead on improving efficiency on the factory floor or the back office." The nation's best schools and top corporations share a key concept – "a clear focus on the customer," explains Katherine Hudson, chief executive of W.H. Brady Co., a Milwaukee manufacturer. "In the schools, that's the student," she added.

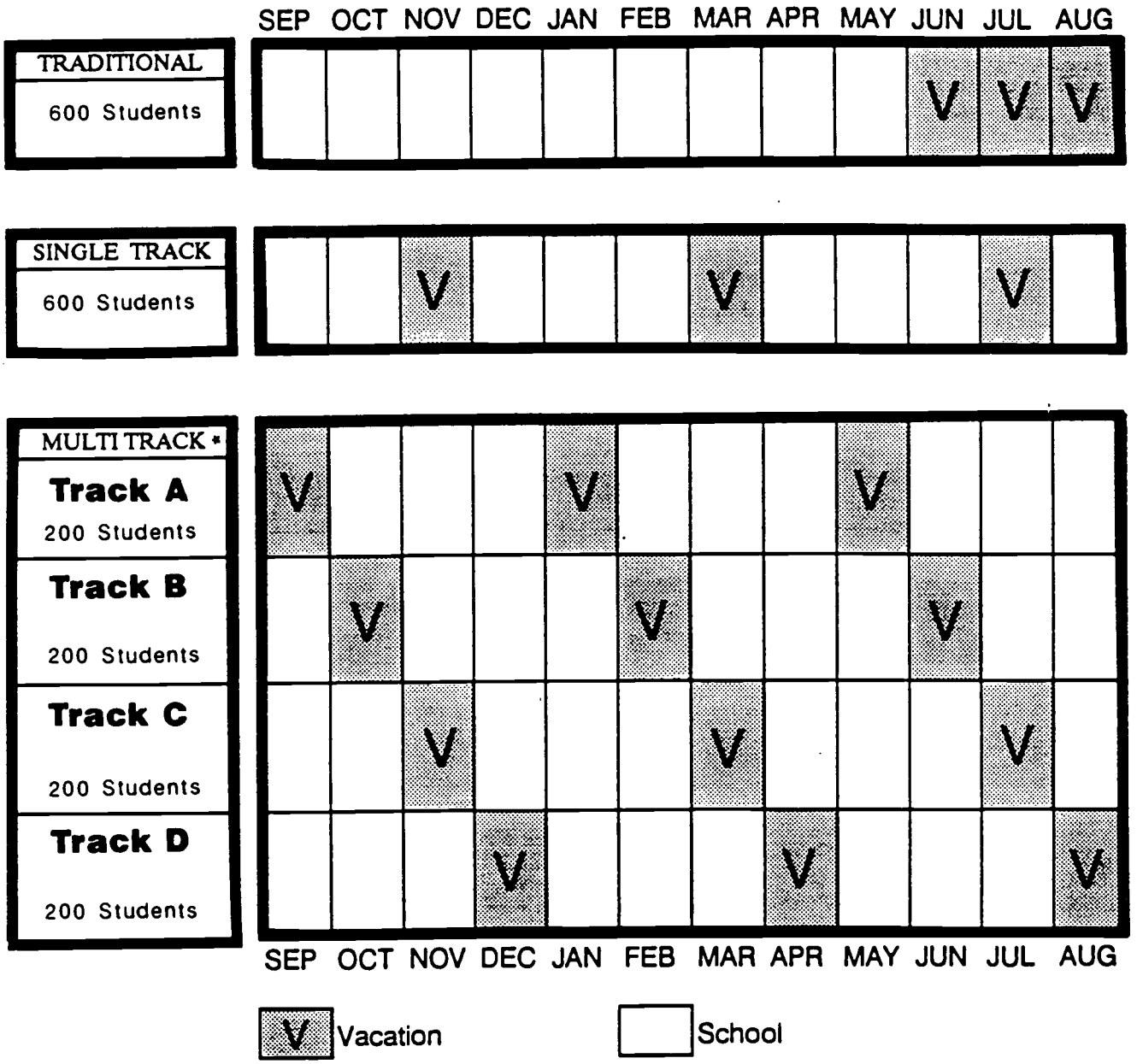
Public education officials can glean several lessons from the corporate world, writes the magazine. First, productivity and quality cannot be enhanced without a handle on information about current operations. And schools fall short in knowing how much money actually is funneled into classrooms, among other things.

The importance of competition is the second lesson, writes the magazine. Voucher programs and charter schools are mentioned as innovative examples that foster competition.

BUSINESS WEEK also recommends that schools "make better use of their physical and human resources, just as Corporate America has." For example, school districts should consider year-round schooling to relieve overcrowded classes. And education dollars should be redirected to early education programs. The magazine lauds "Success for All," a program developed by Robert Slavin of Johns Hopkins U, which uses intensive tutoring to prevent students from falling behind in the early grades. Instead, school districts currently direct more resources to high school athletic programs and specialized courses, reports the magazine.

CALENDAR OPTIONS
Traditional, Single Track and Multi-track

(For a School Which Can Accommodate 600 Students at Any Time)



*For purposes of illustration: (1) a 60-20 calendar is presented with three 60-day/3-month instructional blocks each separated by 20-day/1-month vacation periods; (2) the single track calendar is Track C of the multi-track calendar, and (3) full capacity increases are indicated.

EA 028382

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