



# ANNUAL LEGISLATIVE FORUM

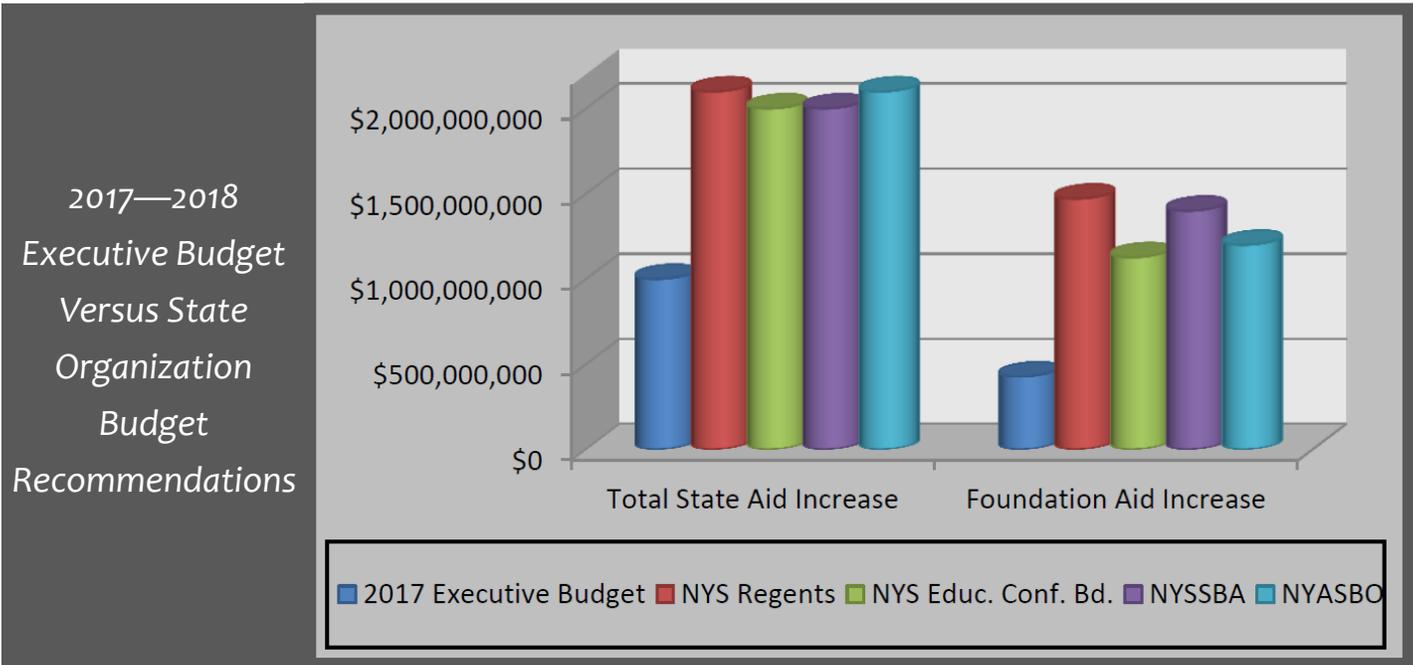
Westchester Putnam School Boards Association March 9, 2017

The Westchester Putnam School Boards Association, Southern Westchester Chief School Administrators and Putnam Northern Westchester Chief School Administrators welcome this opportunity to meet with our legislators to advocate on behalf of our public school districts and students. This toolkit provides background information and data on the key funding issues that affect public schools across our region and threaten their long-term viability.

## STAND UP FOR PUBLIC EDUCATION

**“We can never take for granted the important role that public education plays in our communities and the impact it has on society. Our schools prepare students not just to be college and career ready, but also to be stewards of our democracy and good citizens of the world. This costs money... the state must fulfill its constitutional duty and appropriately fund public education.”**

- Lisa Davis, Executive Director WPSBA; Testimony at Westchester Delegation Public Forum on NYS Budget



# WESTCHESTER PUTNAM SCHOOL BOARDS ASSOCIATION (WPSBA) ANALYSIS

## School District Financial and Demographic Data

School District	NYS: Need/ Resource Capacity	COMBINED WEALTH RATIO (CWR) 2014-15	2015-16 Ttl State Aid as % of General Fund*	2016 % Students Econ. Disadvantaged*	Econ. Disadv % Change: 2011 to 2016	2016 % Students in ELL Program*	ELL % Change: 2011 to 2016	Fall 2016 BEDS - Total Pupil Units^	% Enrollment Change: 2011 to 2016	2016-17 Full Foundation Aid Formula \$ Due	2016-17 Foundation Aid Formula Actual	2016-17 Actual Found. Aid as % Full Found. Aid Formula**	2017-18 Exec Budget: Found Aid Increase	2017-18 Exec Budget: Found Aid % Increase	2016-17 % Students in Private & Parochial Schools^
Ardasley	Low	1.488	9.4%	8%	95%	2%	100%	2,112	2.9%	\$5,642,130	\$3,559,758	63%	\$59,536	1.7%	2.0%
Bedford	Low	2.782	4.9%	28%	375%	12%	54%	4,187	-5.2%	\$2,433,500	\$4,416,411	181%	\$44,164	1.0%	9.4%
Blind Brook-Rye	Low	2.058	6.5%	1%	was 0%	2%	82%	1,517	-0.4%	\$2,457,385	\$1,283,097	52%	\$12,830	1.0%	4.1%
Brewster	Average	1.243	19.6%	29%	125%	7%	52%	3,169	-3.8%	\$13,484,754	\$9,182,239	68%	\$316,988	3.5%	3.8%
Briarcliff	Low	2.211	9.9%	1%	-52%	0%	NA	1,476	-9.6%	\$1,676,354	\$1,467,697	88%	\$14,676	1.0%	5.0%
Bronxville	Low	3.902	5.1%	0%	NA	1%	was 0%	1,648	3.7%	\$955,500	\$1,089,297	114%	\$11,586	1.1%	5.7%
Byram Hills	Low	3.284	4.8%	3%	114%	0%	NA	2,391	-10.7%	\$1,437,500	\$1,927,451	134%	\$19,274	1.0%	6.2%
Carmel	Average	1.101	21.9%	26%	65%	3%	80%	4,191	-4.2%	\$18,687,431	\$16,131,067	86%	\$246,633	1.5%	5.8%
Chappaqua	Low	2.563	7.2%	3%	was 0%	1%	was 0%	3,867	-6.5%	\$2,381,548	\$3,709,573	155%	\$37,095	1.0%	2.4%
Croton Hamon	Low	1.652	10.8%	9%	was 0%	3%	67%	1,654	-4.2%	\$3,393,660	\$2,117,441	62%	\$21,928	1.0%	3.6%
Dobbs Ferry	Low	1.592	10.2%	15%	67%	3%	0%	1,484	1.6%	\$4,089,987	\$2,390,036	58%	\$42,987	1.8%	2.9%
Eastchester	Low	1.606	7.3%	0%	NA	6%	25%	3,278	5.4%	\$8,100,679	\$2,807,578	35%	\$83,186	3.0%	4%
Edgemont	Low	1.915	6.9%	0%	NA	2%	-33%	1,982	2.2%	\$3,485,723	\$1,960,263	56%	\$19,602	1.0%	3%
Elmsford	Average	1.731	7.8%	58%	29%	16%	-9%	1,053	3.9%	\$2,959,280	\$1,421,907	48%	\$19,916	1.4%	19%
Garrison	Low	3.817	8.5%	5%	0%	1%	was 0%	314	-5.4%	\$126,500	\$510,183	403%	\$5,101	1.0%	16%
Greenburgh Central	Average	2.424	7.2%	55%	22%	6%	-8%	1,821	1.2%	\$2,131,772	\$3,308,162	155%	\$33,081	1.0%	24%
Haldane	Low	1.654	12.3%	13%	NA	1%	was 0%	858	-5.1%	\$2,008,363	\$1,553,088	77%	\$16,714	1.1%	4%
Harrison	Low	4.033	3.6%	19%	58%	7%	1%	3,612	1.7%	\$1,986,500	\$2,975,110	149%	\$29,751	1.0%	20%
Hastings-on-Hudson	Low	1.455	10.2%	5%	2%	1%	-41%	1,615	0.6%	\$3,886,360	\$3,024,465	78%	\$41,310	1.4%	2%
Hendrick Hudson	Low	1.594	7.7%	25%	291%	2%	-33%	2,367	-11.2%	\$6,670,580	\$3,523,413	53%	\$58,464	1.7%	4%
Irvington	Low	2.07	6.0%	9%	80%	1%	was 0%	1,702	-4.3%	\$2,866,772	\$1,701,296	59%	\$17,012	1.0%	8%
Katonah-Lewisboro	Low	2.308	7.2%	6%	233%	1%	20%	3,126	-11.6%	\$2,986,163	\$3,910,543	130%	\$39,105	1.0%	10%
Lakeland	Average	0.909	24.7%	10%	11%	1%	-41%	5,769	-7.2%	\$29,971,658	\$23,237,477	78%	\$354,726	1.5%	3%
Mahopac	Low	0.979	25.8%	17%	143%	2%	33%	4,218	-11.9%	\$21,489,522	\$18,725,659	87%	\$256,748	1.4%	4%
Mamaroneck	Low	2.622	5.4%	17%	31%	4%	0%	5,527	7.0%	\$3,055,000	\$4,303,718	140%	\$43,037	1.0%	7%
Mount Pleasant	Low	1.624	9.3%	10%	67%	2%	was 0%	1,899	-5.1%	\$4,783,862	\$2,934,059	61%	\$39,882	1.4%	5%
Mount Vernon	High	0.785	38.3%	74%	1%	8%	-7%	8,124	-11.3%	\$90,224,193	\$68,291,083	76%	\$1,534,890	2.2%	13%
New Rochelle	Average	1.402	15.5%	56%	33%	11%	10%	11,140	1.3%	\$42,251,014	\$24,571,258	58%	\$545,574	2.2%	5%
North Salem	Low	2.187	5.7%	10%	49%	2%	18%	1,107	-15.0%	\$1,609,371	\$1,303,174	81%	\$13,031	1.0%	5%
Ossining	Average	1.249	15.0%	58%	26%	10%	-17%	4,916	10.1%	\$22,864,267	\$8,806,583	39%	\$311,288	3.5%	8%
Peekskill	High	0.681	44.6%	83%	24%	21%	40%	3,483	12.6%	\$37,821,795	\$27,660,851	73%	\$723,198	2.6%	8%
Pelham	Low	1.722	10.2%	10%	25%	1%	0%	2,887	1.0%	\$6,109,418	\$3,180,509	52%	\$44,183	1.4%	4%
Pleasantville	Low	1.377	13.6%	10%	104%	2%	-5%	1,725	-4.2%	\$5,170,552	\$3,000,609	58%	\$64,750	2.2%	3%
Pocantico Hills	Low	4.795	10.7%	21%	46%	2%	0%	618	3.7%	\$149,500	\$617,631	413%	\$6,176	1.0%	4%
Port Chester-Rye	High	0.99	25.4%	71%	8%	26%	8%	4,884	14.3%	\$37,255,006	\$13,960,925	37%	\$735,891	5.3%	7%
Putnam Valley	Average	1.052	21.1%	16%	116%	3%	200%	1,731	-7.5%	\$7,559,290	\$4,833,743	64%	\$94,665	2.0%	3%
Rye City	Low	3.629	4.2%	3%	50%	2%	-46%	3,430	5.4%	\$1,860,500	\$1,974,057	106%	\$23,037	1.2%	10%
Rye Neck	Low	2.132	5.6%	14%	17%	3%	-25%	1,632	8.1%	\$2,663,312	\$1,253,922	47%	\$12,539	1.0%	2%
Scarsdale	Low	3.981	4.4%	0%	NA	2%	-7%	4,825	1.7%	\$2,550,000	\$3,310,391	129%	\$33,103	1.0%	7%
Somers	Low	1.529	10.5%	9%	61%	1%	0%	3,098	-10.4%	\$8,530,330	\$4,445,548	52%	\$87,018	2.0%	6%
Tarrytowns	Average	1.146	16.1%	57%	24%	15%	-12%	2,842	1.6%	\$12,643,710	\$5,959,725	47%	\$160,232	2.7%	7%
Tuckahoe	Low	1.802	8.7%	18%	49%	5%	-19%	1,186	5.3%	\$1,850,115	\$1,163,192	63%	\$11,631	1.0%	12%
Valhalla	Low	1.567	10.0%	16%	60%	3%	50%	1,480	-8.5%	\$4,137,071	\$2,210,621	53%	\$36,756	1.7%	5%
White Plains	Average	1.692	10.8%	55%	12%	15%	15%	7,124	0.0%	\$24,724,454	\$12,793,160	52%	\$210,811	1.6%	16%
Yonkers	High-Big City	0.865	54.0%	79%	9%	12%	3%	27,220	7.4%	\$223,216,616	\$187,784,658	84%	\$5,211,314	2.8%	19%
Yorktown	Low	1.25	17.4%	9%	80%	2%	0%	3,473	-6.2%	\$11,061,000	\$8,645,650	78%	\$135,103	1.6%	5%
<b>New York State^^</b>			<b>58.0%</b>	<b>54%</b>	<b>25.6%</b>	<b>8%</b>	<b>112.5%</b>	<b>2,640,250</b>	<b>-1.1%</b>	<b>\$ 20,774,282,776</b>	<b>\$ 16,474,282,776</b>	<b>82%</b>	<b>\$427,820,389</b>	<b>2.6%</b>	
WPSBA Highest		4.795	54.0%	83%	375%	26%	200%	27,220	14%	\$ 223,216,616	\$ 187,784,658	413%	\$5,211,314	5%	24%
WPSBA 3rd Quartile		2.284	15.4%	28%	80%	7%	31%	4,107	3%	\$ 12,248,033	\$ 7,974,169	101%	\$ 153,950	2%	8%
<b>WPSBA Median</b>		<b>1.653</b>	<b>9.9%</b>	<b>14%</b>	<b>49%</b>	<b>2%</b>	<b>0%</b>	<b>2,617</b>	<b>0%</b>	<b>\$ 3,988,174</b>	<b>\$ 3,244,336</b>	<b>71%</b>	<b>\$ 42,149</b>	<b>1%</b>	<b>5%</b>
WPSBA 1st Quartile		1.282	7.0%	7%	23%	1%	-8%	1,636	-6%	\$ 2,394,536	\$ 1,935,654	54%	\$ 19,681	1%	4%
WPSBA Lowest		0.681	3.6%	0%	-52%	0%	-46%	314	-15%	\$ 126,500	\$ 510,183	35%	\$ 5,101	1%	2%

**Economically disadvantaged students:** are those who participate in, or whose family participates in, economic assistance programs, such as free or reduced-price lunch programs, Social Security Insurance (SSI), Food Stamps, Foster Care, Refugee Assistance, Earned Income Tax Credit (EITC), Home Energy Assistance Program (HEAP), Safety Net Assistance (SNA), or Temporary Assistance for Needy Families (TANF).

**English Language Learners (ELLs/LEPs)** are those who, by reason of foreign birth or ancestry, speak or understand a language other than English and speak or understand little or no English, and require support in order to become proficient in English and are identified pursuant to Section 154.3 of Commissioner's Regulations. These students are also referred to as Limited English Proficient (LEP).

\* Source: SED Report Card data / \*\* Source: ST-3 AT3999, P/NW Clearinghouse data (includes building aid). / ^ Source: Facts & Figure\$ data from districts

^^ Source: Demographic Data from NYS Report Card. Foundation Aid data: NYS 2017-18 executive budget run for 2016-17 Foundation Aid actual: fully funded = 2016-17 actual + 4.3 billion

NYS Demographic data includes Public School Districts and Charter Schools

**TAKE ACTION AND STAND UP FOR PUBLIC EDUCATION AND APPROPRIATE STATE FUNDING!**

# WHERE WE STAND

**Foundation Aid Formula:** We appreciate that every district will receive at least a 1% increase in Foundation Aid (costs increase every year!), and support a save harmless provision. However, the Governor's budget leaves many districts short. Only 10% of the additional \$4.3 billion needed for full phase-in is proposed, whereas the Regents and state education groups recommend a 3 year phase-in. Six of our school districts will still receive less than half the Foundation Aid dollars due them under full funding. Furthermore, if as proposed, 2017-18 becomes the new base year, NYS would default on its constitutional responsibility to provide a funding formula based on actual costs and aligned with need. The chart opposite shows an increase in student need without a like increase in aid. School districts need a transparent, evidence-based formula that includes key criteria, and multi-year reliability.

**Regional Cost Index:** The NYS Executive budget uses an outdated, 2006 Regional Cost Index (RCI) to calculate aid (Foundation Aid multipliers include the Pupil Need Index (PNI) and RCI), rather than the 2012 Regents Regional Cost Index. Moreover, Westchester and Putnam counties are included in the "Lower Hudson Valley" Region Index (2006 index, 1.314; 2012 index, 1.407) that includes seven counties running from Westchester to Sullivan County. Given the huge differential in labor market cost in this regional group, our school districts are short-changed. Westchester labor costs in particular are more aligned with the "Long Island and NYC" Region Index (2006 index, 1.425; 2012 index, 1.488). Ideally, a county-based cost index should be used, similar to the county-based regional cost factor that SED uses in its building aid formula. In the SED 2016-17 building aid calculation, the cost factor for Westchester is 1.5468, Putnam is 1.3931, and others in our regional group have a 1.28. A county index is a more valid indicator of labor costs.

**Adjustments to Tax Levy Limit Legislation:** The maximum allowable increase for 2017-18 will be 1.26%, marking the 3<sup>rd</sup> year of a school levy increase under 2%. This is unsustainable. Adjustments to the levy limit formula are long overdue. The NYS Educational Conference Board (ECB) recommends including enrollment growth in the formula, eliminating negative levy limits with a 0% floor, and allowing for adjustments due to PILOTS, BOCES capital costs, or large tax certiorari. NY State avails itself of a 2% expenditure increase regardless of the CPI. School districts also need a levy limit of at least 2%. Moreover, boards of education should have the same authority as local municipalities to override the levy limit with a 60% vote of the governing body; the budget vote would then require a simple majority.

**Special Act Public School Districts:** Despite being public schools, Special Act tuition rates are set in the same way as private schools, failing to take into account all the costs of public school mandates. A09257/S9257 will help address this inequity by giving SED the authority to create a new rate setting methodology unique to Special Act Public School Districts and their needs.

**Poverty Measures:** The Federal government assigns a national "one-size-fits-all" Federal Poverty Level of \$24,300 for a family of four, no matter where they live. Yet regional factors affect the true face of poverty in our communities. Food Stamp, Medicaid or Free and Reduced Lunch eligibility, Small Area Income and Poverty Estimates (SAIPE census data), and similar measures are based solely on this flat federal threshold. To truly assess the impact of poverty, we need to incorporate a regional poverty factor that considers both income and cost of living expenditures in a given area. The Census Supplemental Measure of Poverty (SPM) and United Way ALICE data (Asset Limited, Income Constrained, Employed) are prime examples.

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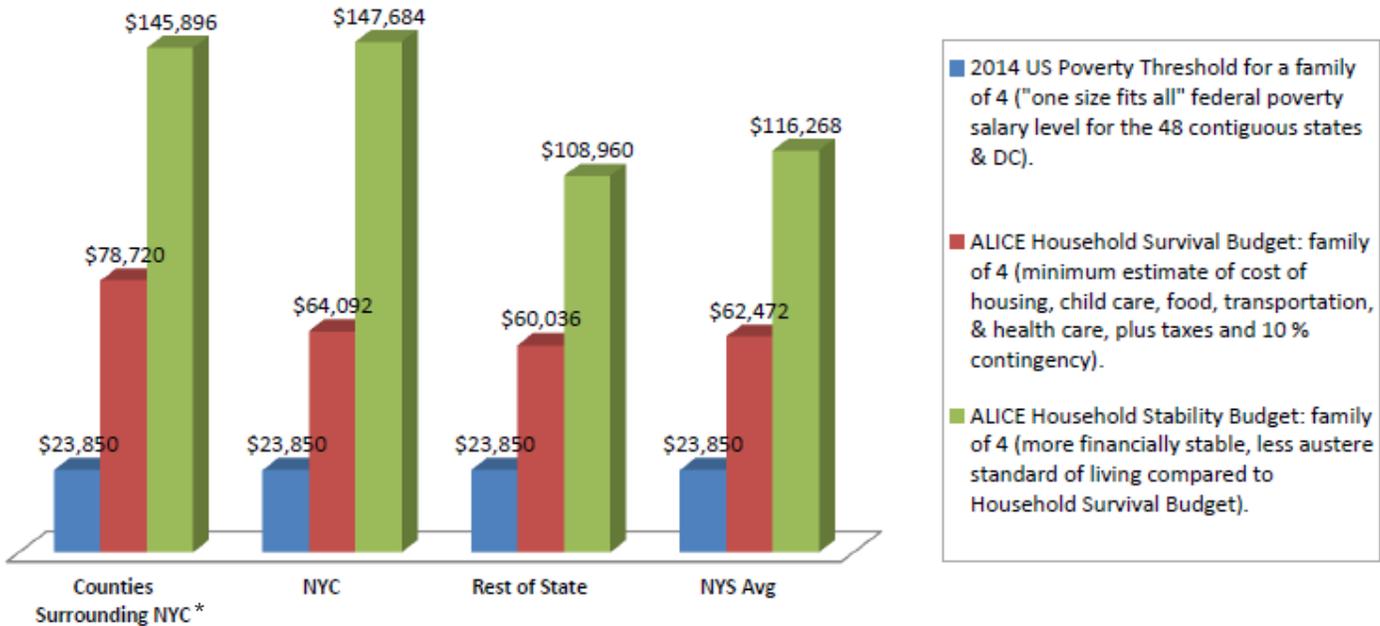




# DEMOGRAPHIC AND FINANCIAL DATA



## ALICE: Asset Limited, Income Constrained, Employed 2016 United Way NYS Study (WPSBA analysis)



\*Counties Surrounding NYC = Dutchess, Nassau, Orange, Putnam, Rockland, Suffolk, and Westchester

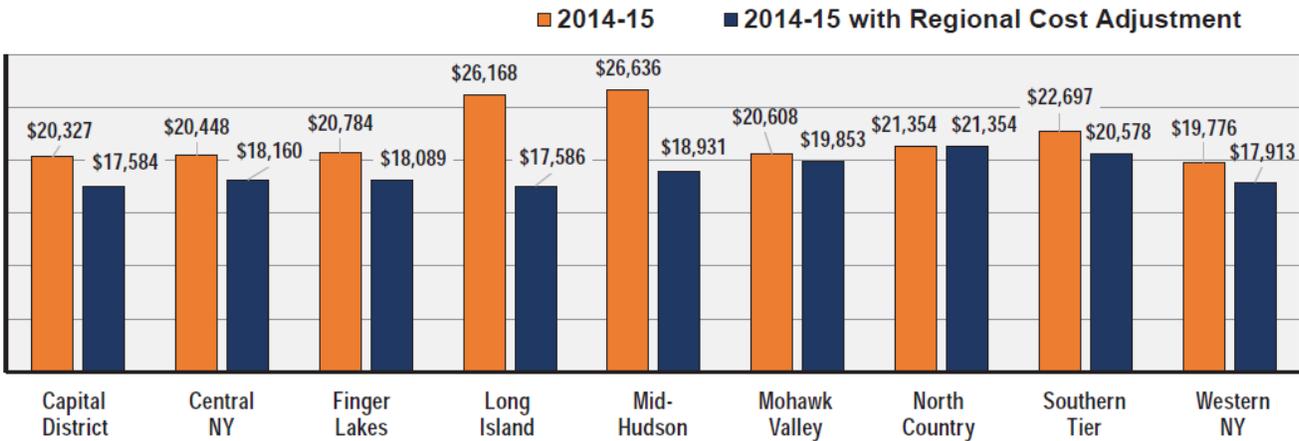
## REGIONAL STUDENT DEMOGRAPHICS (2015-16)

**Economically Disadvantaged**  
Westchester: 38%  
Putnam: 22%

**English Language Learners**  
Westchester: 8%  
Putnam: 3%

**Students With Disabilities**  
Westchester: 15%  
Putnam: 15%

## When Regional Cost Variations Are Factored in, Downstate Spending Falls into Line with Other Regions, 2014-15 (\*From NY State Comptroller, Special Report: Education in New York; Per Pupil Expenditure Analysis)



Source: New York State Education Department (SED), Fiscal Profiles. Figures shown are the median district in each region. SED has created a regional cost index (RCI), updated every three years, to provide a means of adjusting for regional cost variations. This chart uses the 2012 RCI, which is the most recent available. Pupil count used is the DCAADM.