



Bedford Central School District
Inspiring and Challenging Our Students

Superintendent's Budget 2017-18

Presented February 28, 2017

A Path to Fiscal Stability and Sustainability

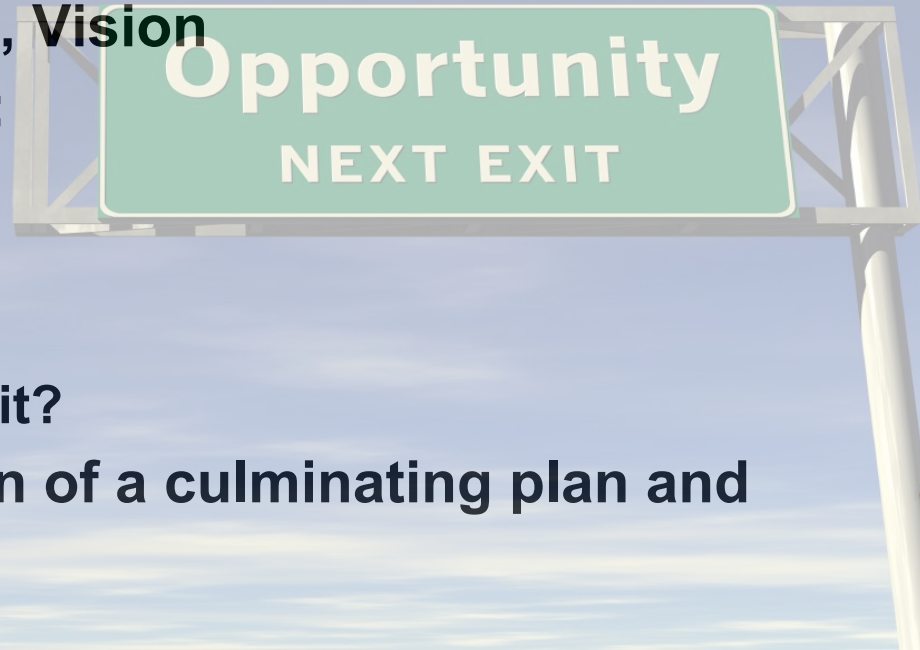




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Opportunities

- Reflect on successes of the past
- Engage and collaborate with the community
- Revisit Values, Mission, Vision
- Ask the BIG Questions:
 - What are we doing?
 - Is it working?
 - How do we know?
 - What do we do about it?
- Budget = representation of a culminating plan and direction





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Budget Website

One-stop portal with all information related 2017-18
BCSD Budget Development





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Budget Highlights

- **Complies with NYS property tax levy cap legislation.**
- **Preserves all existing general & special education programs, as well as extracurricular and athletic programs.**
- **Reverses the trend of relying on unassigned fund balance to balance future years' budgets.**
- **Increases unassigned fund balance rather than decreasing it.**





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Budget Highlights

- **Complies with elementary class size policy guidelines given current enrollment projections using in general 5-year cohort survival (as of enrollment calculations at this time).**
- **Begins to restore cuts deemed unsustainable.**
- **Incorporates efficiencies and improvements in operations and budget management/oversight.**





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BCSD's Mission

The Bedford Central School District shall cultivate curiosity and a passion for learning by providing challenging educational opportunities for all students so they may achieve their full potential as productive and contributing members of society.



BCSD Board of Education

Team Core Values



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CORE VALUES

- Exercising leadership focused first and foremost on students and providing them the best education possible.
- Exercising effective communication and transparency in all public Board matters.



Taken from BCSD's Core Values: *“The role of fiscal and operational practice is...”*



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- ❑ To place students first in all decisions, actions, and procedures.
- ❑ To be responsible for meeting present needs, as well as planning for the future.
- ❑ To respect all school-community stakeholders.
- ❑ To be transparent, clear, balanced, prudent, and as simple as possible.



A Taste of Program and Academic Highlights



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- **FLHS Class of 2017 National Merit Scholarships**
 - Finalists -3
 - Semi-Finalists -3
 - Commended Scholars
- **178 students sat for the Math Association of America's American Math Competition**
- **FLHS Science Olympiad Team 3rd year competing at State Tournament**
- **BCSD named NAMM Foundation Best Community for Music Education**
- **WPES named State School of Character and will compete on a national level**
- **FLHS on College Board's 4th Annual Honor Roll for Expanding Opportunity and Improving Performance of AP Students**



BUDGET IMPACT ANALYSIS

Start →



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2016-17



Resource: Budget Impact Document



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Purpose: Provide a summary of the impact of budget and staffing reductions made for the 2016-17 School Year.

Process:

- Listed specific budget and staffing reductions that were made for the 2016-17 school year.
- Worked collaboratively with principals and directors to identify and describe specific impacts of those reductions.



| Program or Position | FTE | School Level | Bargain- ing Unit | Amount of Reduction | Remedy Implemented | General Notes on Impact |
|---------------------|-----|--------------|-------------------|---------------------|--------------------|-------------------------|
|---------------------|-----|--------------|-------------------|---------------------|--------------------|-------------------------|

Elementary Classroom Teacher

7

Elem

BTA

\$700,000

None

Increased class sizes; sustainability depends on student population size and the success of teaching large heterogeneous classes; our approach to this is differentiation, it becomes increasingly hard with more kids; also less aide support increases the challenge

House Director

1

FLMS

BASA

\$190,000

None

Increased the demand on remaining administrators to be responsible for school wide discipline; House Directors are no longer able to facilitate and or oversee/participate in House, Team and Department meetings; this impacts leadership of curriculum and instruction schoolwide; may have impacted timeliness of responses to family and community

Budget Impact Analysis Example



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2016-17 Budget Summary and Impact (Personnel, Program)

- **Lost 52 positions**
- **Eliminated the provision of an elementary librarian in each school. We now have one librarian for five elementary schools.**
- **Cut teacher aides, safety monitors, clerical support.**
- **Increased class sizes across the district, and exceeded our own BoE Policy Guidelines for Elementary Class Sizes in grades 2-5.**
- **Cut teachers in numerous areas.**



2016-17 Budget Summary and Impact



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- **Cut important administrative positions which worked directly with students, parents and teachers to maintain safe and well-run buildings.**
- **Sustained significant reductions to professional development for staff**
- **Cut supplies and equipment to support teaching and learning.**



Tool: Position Analysis



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Purpose: Attempt to articulate the breadth and depth of responsibilities associated with/services provided by each staffing position in the district.

Process:

- Created lists of all staff and faculty positions in the District.
- List job responsibilities and tasks associated with each position.
- Collaborate with leadership team to further articulate unique roles and responsibilities associated with each position where they exist in each school or department.





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Position Analysis Example

| <u>Position Title</u> | Bldg. / Dept. | Total Bldg/ Dept. | Total FTEs | General Job Description | Other responsibilities |
|--------------------------------------|----------------------|--------------------------|-------------------|---|---|
| <u>Account Clerk</u> | CO Bus. Office | 2 | 2 | Under supervision of a higher-level account clerk or accountant, the incumbent of this position performs clerical work of average difficulty in connection with maintaining a variety of financial records and accounts, either manually or through the use of an automated financial record keeping system. This work requires limited judgment in the carrying out of prescribed and established procedures. Supervision is not a responsibility of this position. Does related work as required. | 1 - Assists with facilities-related accounts and capital projects 2 - Assists with all other district accounts |



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Guiding Principles for the 2017-18 Budget

As a result of several years of significant and ongoing fiscal challenges, BCSD has been categorized as in **Moderate Fiscal Stress**, a stress level increase to second from the highest level.

BCSD is committed to:

- Long-term fiscal health.
- Our capacity to continue a commitment to outstanding programs for all students.
- BCSD's regional stature and reputation for excellence.





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Six Budget Design Principles



Budget Design Principle #1 for 2017-18



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Work to maintain curricular and instructional programs

- Minimal changes in staffing levels with offsets where possible.
- Continue to provide internal professional development while maintaining reduction of contracted and paid professional development.



Budget Design Principle #2 for 2017-18



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Limit projected expense increases to:

- Triborough increase for unsettled employment contracts.
- Regional healthcare cost increase trend (currently 8%).





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Budget Design Principles #3 and #4 for 2017-18

- ***Achieve compliance with state and/or federally mandated programs with minimal additions to staffing or other costs.***
- ***Work to maximize operational efficiencies.***



Budget Design Principles #5 for 2017-18



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Revenue assumptions:

- Work to maximize State Aid.
- Build budget to allowable NY State Property Tax Cap increase.



Budget Design Principle #6 for 2017-18



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Increase reserves:

- Build in operational contingencies for unanticipated expenditures.
- Continually seek efficiencies to bring in expenses under budget.





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Budget Vital Statistics

Preliminary Budget, February 28, 2017

Total Budget = \$128,925,832

- 1.95% Tax Levy Increase
- 1.95% Allowable Tax Levy Increase
(per tax cap formula)*
- 1.67% Budget to Budget Increase

*Subject to change pending New York State school aid runs





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Budget Vital Statistics

APPROPRIATIONS

% OF FY17-18 BUDGET \$ OF BUDGET

| | | |
|---|--------------|-------------------|
| Salary and Benefits | 77.74% | \$100,221,282 |
| Contractual | 11.21% | \$ 14,449,340 |
| Debt Service | 5.56% | \$ 7,168,805 |
| BOCES | 2.85% | \$ 3,670,900 |
| Material & Supplies | 1.01% | \$ 1,306,629 |
| Tuition | 0.69% | \$ 883,634 |
| Textbooks | 0.42% | \$ 536,770 |
| Capital - repair | 0.27% | \$ 349,060 |
| Equipment | 0.14% | \$ 181,412 |
| <u>Special aid (summer SE expenses)</u> | <u>0.12%</u> | <u>\$ 158,000</u> |

2017 - 18 Budget

\$128,925,832





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Budget Vital Statistics

REVENUE

% OF FY17-18 BUDGET \$ OF BUDGET

| | | |
|--|--------|------------------|
| Property Taxes | 91.23% | \$117,612,860 |
| State Aid | 5.51% | \$ 7,102,972 |
| Miscellaneous Receipts | 3.07% | \$ 3,960,000 |
| Appropriated fund balance: ERS Reserve | 0.16% | \$ 210,000 |
| <u>Appropriated fund balance: Unemployment Reserve</u> | 0.03% | <u>\$ 40,000</u> |

2017 - 18 Budget

\$128,925,832





Cautionary Note

- **Budget formulated 20 months prior to end of the upcoming fiscal year.**
- **Unknown and Unknowable issues:**
 - Changes to laws and mandates
 - State aid will change based on political issues
 - Economic, political and educational environments change
 - Enrollment, ELL and special education services are constantly changing
 - Increase in student social/emotional issues
 - Repair of facilities have been quantified and require attention
 - Technology instruction and infrastructure needs





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Property Assessment, Equalization Rates, Budget and Levy Increases, and Tax Rate History

- **In section 2 - Budget Overview - of the Budget Book.**
- **Working with tax assessors to finalize the 2017-18 numbers.**
- **These numbers will change throughout the budget process as the Board revises the proposed Superintendent's Budget and/or if there are modifications to State Aid.**
- **We will update these numbers for the Board and public for each budget work session, and update the "Budget Book" online accordingly.**



| NYS TAX CAP FORMULA 17-18 | BCSD 2017-18 TAX CAP CALCULATIONS | | % Change in Levy |
|---|--------------------------------------|------------------------|--------------------------------------|
| FY16-17 Tax Levy | \$115,368,835 x | | |
| Tax Base Growth Factor | 1.0072 = | = \$116,199,490 | .72% |
| FY16-17 Exclusions | - \$6,730,854 | | -5.83% |
| FY16-17 Tax Levy Limit | | = \$109,468,637 | |
| Allowable Levy Growth Factor (CPI) | x 1.0126 | | |
| FY17-18 Tax Levy Limit before exclusions | | = \$110,847,941 | 1.20% |
| FY17-18 Exclusions | + \$6,764,919 | | 5.86% |
| FY17-18 Allowed Levy Growth | | = \$117,612,860 | 1.95% (net change in levy) |

Budget Versus Actual Expenditures Recent History

| | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 |
|--|---------------|---------------|---------------|---------------|--------------------|---------------|
| <u>Original Budget</u> | \$122,698,040 | \$125,057,000 | \$126,500,000 | \$127,199,424 | \$126,804,885 | \$128,925,832 |
| Budgeted Use of Unassigned Fund Balance to balance budget | -\$5,730,000 | -\$3,550,000 | -\$3,000,000 | -\$2,600,000 | \$0 | \$0 |
| Net Change in Fund balance at June 30 | -\$2,774,295 | -\$1,893,919 | -\$1,628,721 | -\$4,799,044 | \$1,912,340 | TBD |

5-Year Projection of Fund Balance



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| | Projected Fund Balance | % of Budget |
|------|------------------------|-------------|
| 2015 | \$10.5M | 8.36% |
| 2016 | \$5.7 M | 4.40% |
| 2017 | \$7.6 M | 6.13% |
| 2018 | \$7.4 M | 5.73% |
| 2019 | \$6.6 M | 4.99% |
| 2020 | \$5.4 M | 4.04% |
| 2021 | \$3.2 M | 2.33% |



What does this mean?



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- Note that fund balance begins to decrease again in 2019.
- This model **assumes** we spend right to our budget each year.
- Disciplined budget monitoring, practices, and continued innovative budget solutions can help continue change this trajectory in the right direction for the future.
 - This is a multi-year approach.
- It is also necessary to bring expenses in line with revenue generation capacity to help this trend continue in the positive direction, and in a more rapid manner.





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Programmatic Implications of the 2017-18 BCSD Budget

Additions/Reinstatements and Reductions/Efficiencies





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Budget Program Additions/Reinstatements

- ❑ **3 Elementary Teachers to bring class sizes to BoE Policy Guidelines: \$213,000**
 - ❑ Note: No contingent positions
- ❑ **1.5 Librarians: \$120,000**
 - ❑ Note: Brings BCSD to 2.5 Elementary Librarians, or .5 per school

Rebuilding



Special Education and Pupil
Personnel Services
Departments - Restructuring



2016-17

2017-18

Dir. SE/PPS

Asst. Dir.
SE/PPS

Office Staff

Elem. SE
Coord.

Elem.
SE/CSPS
Coord.

Sec. SE
Coord.

2 x .5 Asst.
Tech.

2 x SE Job
Coaches

Dir. SE

K-12 Supv. SE

Office Staff

Elem.
SE/CSPS
Coord.

.5 Elem. SE
Coord.

Sec. SE
Coord.

2 x .5 Asst.
Tech.

Dir. PPS

**.5 SE Trans.
Coord.**

**3 x SE Job
Coaches
(add 1)**

BOLD = New or Reinstated Position



Budget Program

Additions/Reinstatements



Restructure of Special Education and Pupil Personnel Services

Leadership:

- ❑ K-12 Director of Special Education
 - ❑ Note: Splitting Dir. of SE/PPS back to a Dir. of SE and a Dir. of PPS
- ❑ Director of Pupil Personnel Services Reinstatement: \$165,369
- ❑ K-12 Supervisor of Special Education: \$151,122
 - ❑ Note: Currently have an Assistant Director of SE/PPS; eliminating this position
- ❑ Elementary Special Education Coordinators (1.5)
- ❑ Secondary Special Education Coordinator
- ❑ Transition Coordinator: .5 FTE, \$38,500
- ❑ Transition Job Coach: \$38,500
 - ❑ Note: Currently have two.
- ❑ Assistive Technology (2 x .5)

Rebuilding





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Budget Program Additions

- ❑ Attendance and District Residency: \$30,000
- ❑ Demographic Study, Spring 2018: \$15,000



Rebuilding





Budget Program Reductions and Efficiencies

- ❑ **Equalize building ratios of non-mandated aides/clerical staff and seek efficiencies, 4 FTEs: (\$216,700)**
- ❑ **Elementary Special Ed. Coordinator .5: (\$50,000)**
 - ❑ **Part of Restructure: Leaves 1.5 FTE Elementary Special Ed/CPSE Coordinators and 1 FTE Secondary SE Coordinator; corresponding ADD of a K-12 SE Supervisor**





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Other Program Modifications, Improvements and Efficiencies

- Transportation - refinement of routes.
- Maximizing State Aid through more accurate and thorough data reporting.
- Increased use of BOCES services to generate State Aid.
- Consolidation of Head Custodian at Fox Lane to 1 campus Head Custodian.
- Continued use of Cafeteria fund surplus to support improvement in food service areas throughout the district.





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Additional Consideration

Student Assistance Counselor

- Position is funded for 2016-17 via Bullet Aid compliments of Assemblyman Buchwald.
- We have asked for Bullet Aid for 2017-18 for this position again.
- Village of Mt. Kisco has decided to re-apply for the five year Federal Drug Free Communities (DFC) grant to fund the Mt. Kisco Partners in Prevention Coalition.
 - Would fund one day of our SAC at \$13,990 per day.



Other Unmet Needs NOT in the 2017-18 Superintendent's Budget



- Librarians (2.5 would bring us back to one per elementary school).
- ESOL teachers to meet expanding program needs.
- Teaching positions to expand High School electives.
- Tiered Support Teachers to support struggling learners.
- Teaching Positions to provide Enrichment opportunities for students.
- Contingency teaching positions.
 - Some elementary Kindergarten numbers according to principals seem to be exceeding projections already.
- Elementary Music position(s) to reinstate frequency of elementary instrumental music lessons.
- Middle School Intramural Programs.
- Transportation enhancements to provide flexibility and improved routing.
- Capital Expenses and Improvements to meet facilities improvement needs.
- SAC Support (both MS & HS).



Key Budget Advisory Committee recommendations incorporated into budget development



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- Ensure expenses do not increase greater than increases in revenues.
- Evaluate methods of reducing the cost of healthcare.
- Engage a consulting firm to identify areas in which the district can increase State aid through refinements in data reporting.
- Maintain sufficient contingency for various circumstances.
- Continually evaluate and refine leadership/management structures for all programs/schools, with an eye toward balancing effectiveness and efficiency.
- Carefully and thoroughly evaluate the 2016-17 Budget Impact Analysis to fully understand the impact of budget reductions.
- Work to maintain elementary class sizes consistent with BoE Policy #4415.
- Work to rebuild elementary library/enrichment programs in some manner over time.



Key Budget Advisory Committee recommendations incorporated into budget development



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- Communicate how the district is economically sustainable, efficient, and effective.
- Seek revenue by charging for building use for non school sanctioned events.
- Work to protect programs and services for all students, including middle and high school programs.
- Reevaluate the middle school “house” structure to maximize the use of personnel and create reasonable and equitable class sizes.
- Explore alternate ESOL delivery models at MKES, and evaluate the effectiveness and cost of such programs.
- Engage the five towns in discussion regarding topics such as residency, the tax formula, tax certiorari processes, and student safety.



Key Space and Enrollment Advisory Committee recommendations incorporated into budget development



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- Institute additional measures to ensure students attending the BCSD actually reside within its borders. *Residency Fraud*, meaning students attending BCSD schools who do not actually live in the borders of BCSD, has negative consequences for the district.
 - Initial evaluation of need to better understand the nature and extent of residency fraud in BCSD.
- Evaluate registration processes and work to develop some form of periodic re-registration process to verify residency in BCSD.
- Reconvene a Space and Enrollment Committee in 2018 specifically for the purpose of evaluating and considering the closing of a school, depending on a new demographic study, on or about the school year 2020-21.
 - Undergo a new demographic study during the spring of 2018.



Key Space and Enrollment Advisory Committee recommendations incorporated into budget development



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Form a special committee in the coming year (2017-18) to specifically study the potential for a DLBE Magnet Program.

- Fully explore potential problems and opportunities, intended and unintended consequences, and the viability of such a program.
- Implementation of such a program would require significant education efforts to ensure all district families fully understand the program in order to make an informed decision.
- A [potential model](#) was explored and is contained in the [Space and Enrollment Advisory Committee report to the BoE](#).





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Legislative Advocacy



What have we done?

Thank you to the
Community.





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Legislative Advocacy Key Messages

BCSD has a substantial and rising population of high need and at risk students comprised of English Language Learners (ELLs) and students in poverty who receive Free and Reduced Price Meals. Out of 46 districts in Westchester and Putnam counties, the BCSD is:

#4 in English Language Learner student growth

#7 in English Language Learner students as a percent of total enrollment

#11 in Free and Reduced Lunch Program (FRLP) participation

Yet, BCSD is #40 in the amount of the state aid we receive.





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Some Legislative Asks

For a full list see our [Advocacy Webpage](#).

- **Modify the State aid formula to increase the weight for ELLs.**
- **Use the median, instead of mean, to determine District Wealth Index.**
 - **BCSD's index is skewed due to extraordinary pockets of wealth, thus dwarfing real educational and programmatic needs by many.**
- **Use current data to recognize the poverty in our community. Data from the 2000 census is not representative of our current population.**
- **Lower the extraordinary cost threshold to provide relief to school districts to educate students with extraordinary needs.**
- **Provide BCSD additional State Aid to assist with our fiscal stress level and confluence of fiscal problems.**



Budget and BoE Election Timeline



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February 2017

- **February 28** - Presentation of the Supt's Preliminary Budget to the Board.

March 2017

- Board Review and Discussion/Deliberation of Budget.
- **March 15** - Budget Workshop.
- **March 22** – Budget Workshop.
- **March 29**- Board adopts budget proposition.

March - April 2017

- Staff and Public Budget Presentations/Q & A's.

May 2017

- **May 3** - State Mandated Budget Hearing.
- **May 16** - Annual Budget Vote & School Board Election.



Questions