

August 6, 2024

To the Rockefeller Institute of Government:

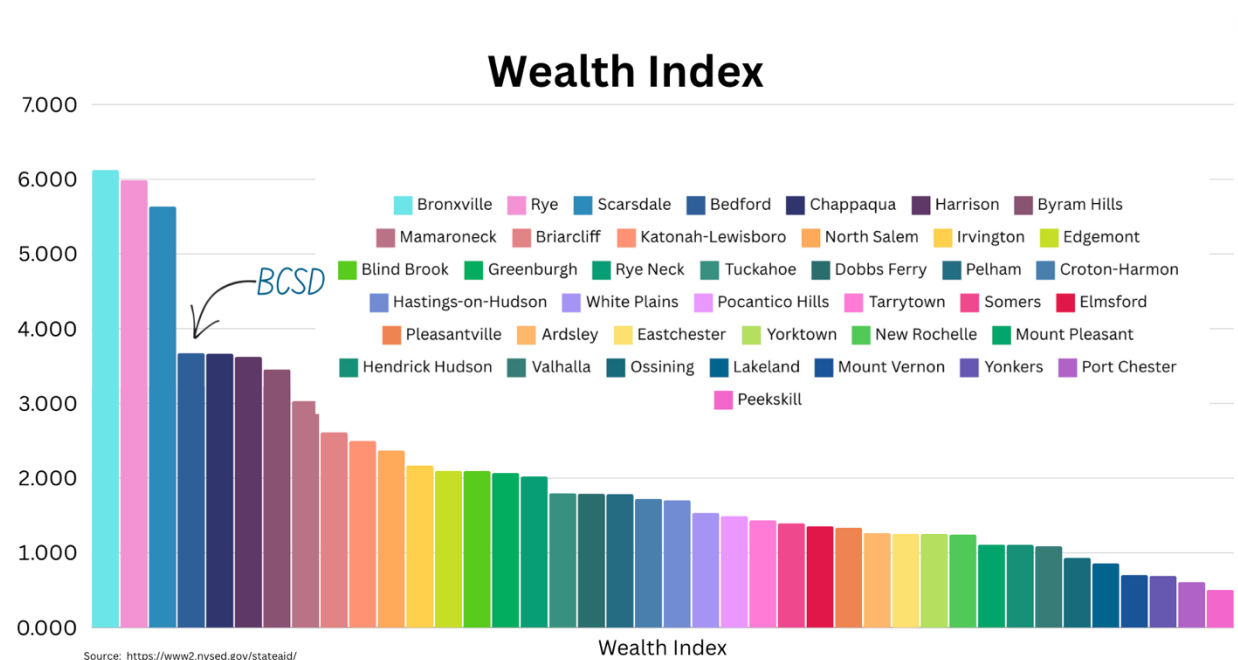
Thank you for accepting written testimony as you begin the ambitious process of reviewing the New York state formula for foundation aid. As a parent of a child in the Bedford Central School district, I am deeply invested in the development of a revised formula that better captures the multifaceted needs of our students. As a researcher, I am concerned that districts like Bedford, which is an outlier in so many wonderful ways, could be easily overlooked if the formula is not sensitive enough to capture our unique demographic blend. Finally, as a schoolboard member, I write to provide essential context as you review and, hopefully, refine the formula.

Bedford Central School district is unlike any other in Westchester County (and perhaps the state), and therefore can be a powerful case study for the exercise before you. The state's current foundation aid formula has many features that have not kept pace with our rapidly changing society.

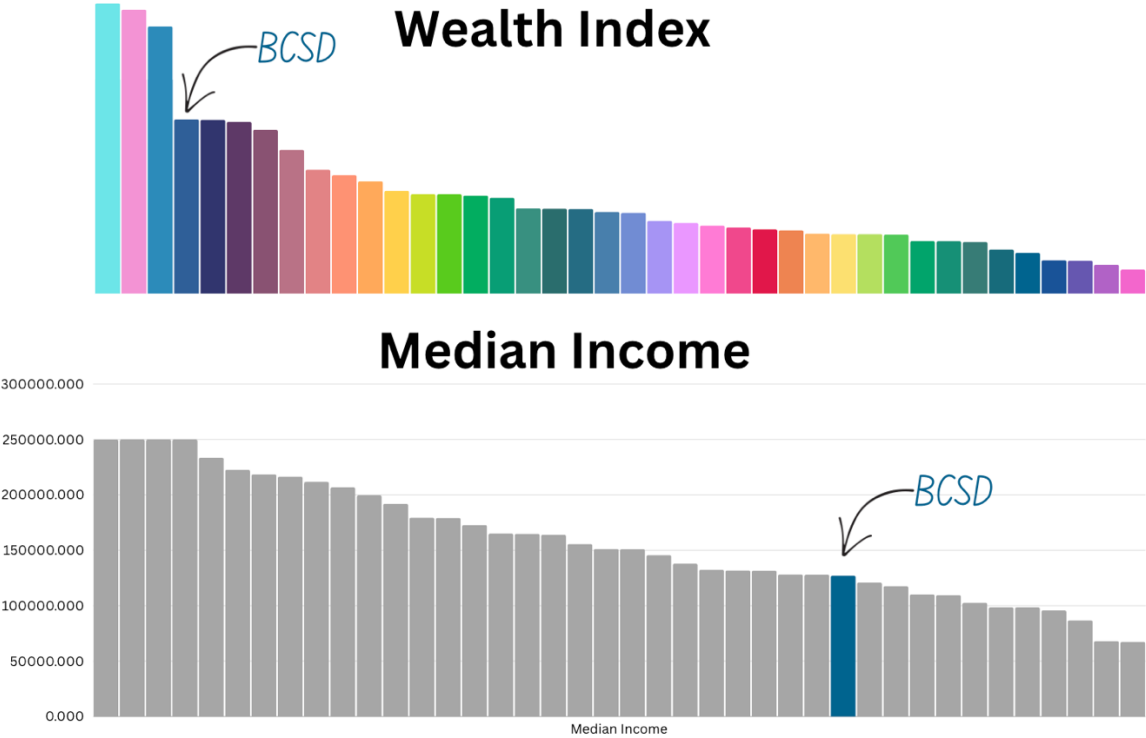
This testimony is broken into four sections that illuminate Bedford's unique positioning: 1) challenges with the Wealth Index as a measure of need, 2) critical nuances surrounding the requirements of English Language Learners, 3) the dangers of a formula that masks poverty, and 4) considerations that may support your review of the formula.

### Problems with the Wealth Index

As it stands, the Wealth Index is one of the formula's driving determinants of aid. The Wealth Index is a proxy for affluence which assigns each district a score based on the mean income of its residents. Here is a look at the wealth indices for the districts in Westchester County:



As you can see, BCSD falls within the top five wealth indices in the County. However, due to pockets of extreme affluence, our district’s positioning does not accurately reflect our demographic mix; these income outliers inflate our Wealth Index. Here is how BCSD’s position would change if graph were arranged by *median* income, as opposed the *mean* income on which the Wealth Index is based.

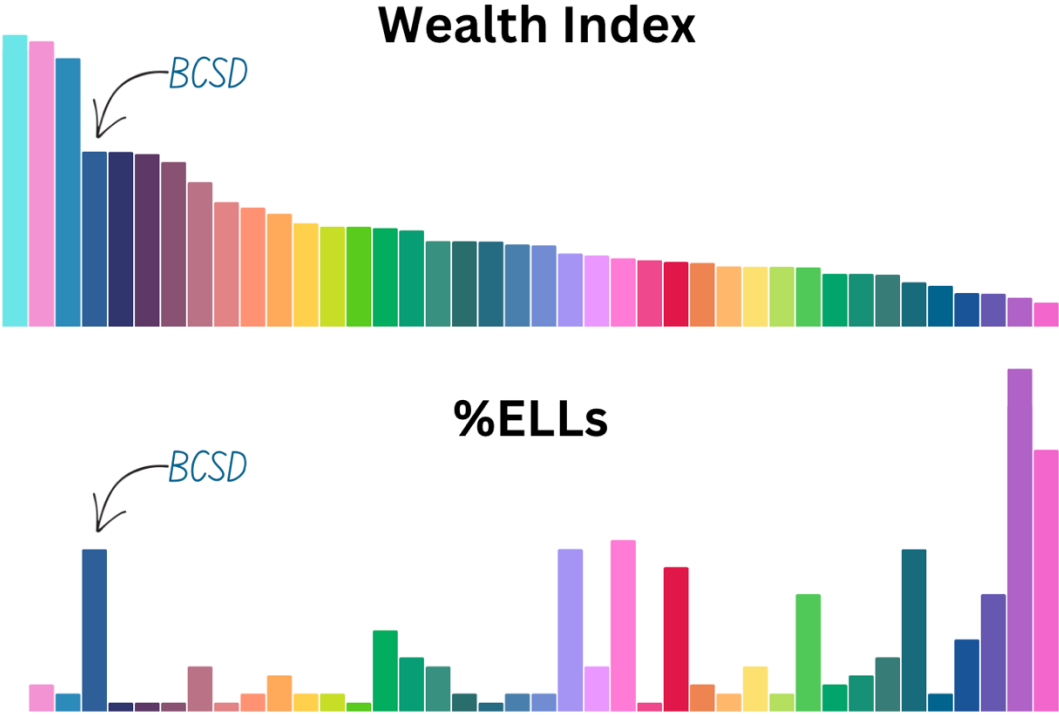


As the second graph illustrates, BCSD’s position shifts from the top five wealthiest districts in the County to the bottom third. As a matter of basic statistics, *median* income is the appropriate measure of central tendency to use for the Wealth Index as it is much less susceptible to outliers that skew the data.

On its own, one could argue that the tax revenue generated from the outliers inflating the Wealth Index might offset any inaccuracies related to central tendency. As you will see, however, income is just one area in which BCSD is an outlier district. Our demographic composition, including the significant number of English Language Learners and economically disadvantaged students, requires further adjustments to the formula.

**Assumptions About English Language Learners**

Because the Wealth Index is such a powerful driver <sup>1</sup>in the current formula, it carries with it assumptions about the number and needs of our district’s ELLs. Here is a look at the percentage of ELL students, arranged from highest to lowest Wealth Index:



In Westchester County, it is the Wealth Index that most influenced the governor’s initial proposed change in aid. Although the formula also includes a measure for ELLs, the influence of the Wealth Index made this measure inconsequential. It therefore becomes a healthy exercise to explore the relationship between the percentage of ELLs and Wealth Index. As you can see above, BCSD is again an outlier in its Wealth Index to % ELL relationship. The bottom graph presents the ELL population in order of Wealth Index, indicating that BCSD’s standing more closely matches the County’s bottom half of wealthiest districts than it does its top five.

Another challenge with the current formula’s measure of ELLs is that it is not sensitive enough to capture the spectrum of needs within such a large, aggregate label. As your committee knows, ELLs are categorized according to their scores on the New York State English as a Second Language Achievement Test (NYSESLAT), which ranks English proficiency from 1 (entering) to 5 (commanding). Future revisions to the formula should account for the *proficiency* level of ELLs (i.e., it may require fewer resources to educate a level 4 ELL than a level 2 ELL) as well as the prior educational experience of each student in their primary language (e.g., students whose education was interrupted, low quality, or lacking in their country of origin may require more resources to educate than students who previously had a stable, quality education).

<sup>1</sup> A simple Pearson correlation revealed that Wealth Index was the only variable that had a relationship with the previously proposed reduction of state aid.  $p < .001$

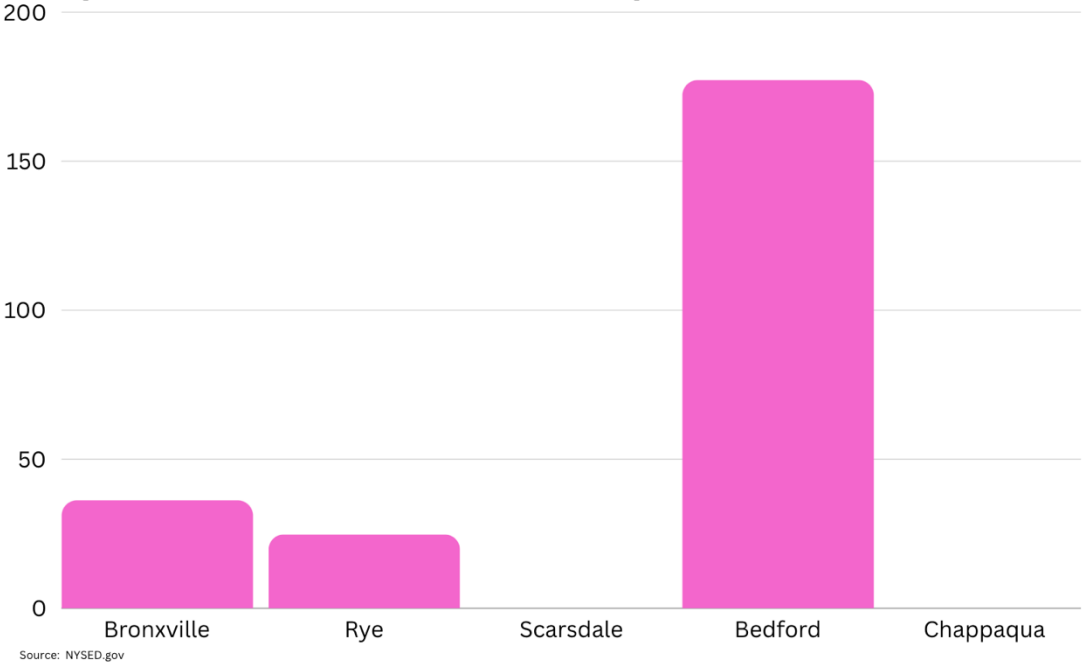
BCSD is proud to serve many newcomers to our country regardless of their age of entry, and revisions to the formula must capture the unique needs of our student body.

**Economically Disadvantaged Students**

BCSD is also home to a socioeconomically diverse community. Like it does with our ELL students, the current formula masks the true impact of economic disadvantage on our district. It is well known and widely accepted that students navigating the pernicious effects of poverty require additional resources in order for school to have a compensatory effect. The previously presented mean vs. median approach to income measurement indicated that BCSD’s Wealth Index belies its true economic standing. But with almost 40% of our students living at or below the poverty level, a closer look at economic need is essential.

Federal Title 1 allocations are instructive when considering the actual needs of students. As you can see, BCSD is again an outlier within the top five Wealth Indices in the County when it comes to federal acknowledgement of poverty:

**Per Pupil Title I Allocations for the Top Five Wealth Index Districts**



BCSD educates economically disadvantaged students at all grade levels, and the need is especially concentrated at Mount Kisco Elementary School, our Title 1, Dual Language Bilingual Education school in which ~70% of the students live at or below the poverty level.

As with the sensitivity required for understanding the degree of support necessary for ELLs, we believe the formula must also capture more nuance in its assessment and weighting of economic need.

## Considerations

For the reasons detailed above, we believe the current foundation aid formula fails Bedford Central School District and systematically shortchanges our students. As such, we are particularly grateful for, and invested in, your careful review of the formula components.

With the context provided above, we recommend the following:

- Retool the Wealth Index to use median income as a valid measure of central tendency.
- Model the various weighting blends of the formula's measures using BCSD, typical districts, and other outlier districts to understand real-world impact of formula revisions.
- Consider the valuable information lost when data becomes aggregated. In reducing ELLs and economically disadvantaged students to a composite aggregate, the formula becomes unsophisticated and lacks the sensitivity to accurately measure need, especially for districts like ours with atypical demographic blends.
- Refresh the measures on which the formula is based. Outdated census data and sources that are notoriously under-reported (like free and reduced lunch requests) lead to an inaccurate assessment of need.
- Rather than a singular formula, consider a dashboard approach that transparently disaggregates the weights influencing funding. With such a tool, districts could better understand the decision-making process. This strategy would have the added benefit of adaptability by the state in the future. A modular approach reduces the need for untangling complex formulas in our ever evolving society, and is a [strategy](#) being examined for many of the same reasons to understand the economic health of nations ( as an update to the formulaic GDP approach).

The Bedford Central School district is a willing partner in your efforts to improve the foundation aid formula, and ultimately, the educational experience of New York students. Thank you for taking on this ambitious and necessary review.

Sincerely,

Lisa Mitchell, Ed. D.  
Bedford Central School District Trustee