



Sag Harbor UFSD 2017-2018

**Proposed Budget Presentation
for Noyac Civic Council
May 9, 2017**

2017-18 Proposed Budget

Proposed Budget - \$39,907,110:

- Budget to Budget Increase – 2.92%
- Property Tax Levy Limit – 3.8656%
- Projected Tax Levy Increase – 3.49%
- Projected Tax Levy - \$36,288,769
- Property Tax Levy Limit - \$36,420,488
- Tax Levy **UNDER** the Levy Limit - \$131,719

For the sixth year, that the tax cap has been in effect, the proposed budget and tax levy is below the tax cap and maintains all programs!!!

**Open Book New York
Office of the State Comptroller
Thomas P. DiNapoli, State Comptroller**

Trend Report for Sag Harbor Union Free School District

Property Tax Cap (Data elements presented below are “as submitted” by the local government, and have not been modified or certified by OSC)

Tax Levy Limit (Cap) before Exclusions

	2018	2017	2016	2015	2014	2013
Tax Levy Prior Year	35,065,000	34,050,000	33,223,918	32,739,375	31,546,719	30,945,209
Prior Year Reserve Offset	0	0	0	0	0	0
Reserve Amount	0	0	0	0	0	0
Tax Base Growth Factor	1.0249	1.0224	1.0166	1.0091	1.0086	1.0080
PILOTS Receivable Prior Year	140,000	140,000	152,159	152,159	152,159	152,159
Tort/Judgment Exclusion Prior Year	0	0	0	0	0	0
Capital Tax Levy for Prior Year	1,952,191	1,664,979	1,905,683	2,160,842	2,152,545	2,251,120
Allowable Levy Growth Factor	1.0126	1.0012	1.0162	1.0146	1.0200	1.0200
PILOTS Receivable Current Year	150,000	140,000	140,000	152,159	152,159	152,159
Available Carryover from Prior Year	0	0	0	0	0	0
Total Levy Limit before Exclusions	34,405,914	33,187,686	32,400,666	31,329,479	30,261,828	29,523,527

Exclusions

Tax levy necessary for expenditures resulting from tort orders/judgments over 5% Prior Year Tax Levy	0	0	0	0	0	0
Capital Tax Levy for Current Year	2,014,574	1,952,191	1,664,979	1,905,683	2,160,842	2,051,835
Tax levy for pension contribution expense						
TRS	0	0	0	0	403,746	0
ERS	0	0	0	0	0	15,822
Total Exclusions	2,014,574	1,952,191	1,664,979	1,905,683	2,564,588	2,067,657
Total Tax Levy Limit, Adjusted for Transfers Plus Exclusions	36,420,488	35,139,877	34,065,645	33,235,162	32,826,416	31,591,184
Reserve Amount Used to Reduce Current Year Levy	0	0	0	0	0	0
Proposed Levy for Current Year, Net of Reserve	36,288,769	35,065,000	34,050,000	33,223,918	32,739,375	31,546,719
Total Tax Levy Limit Adjusted for Transfers Plus Exclusions compared to the Prior Year Tax Levy	3.9%	3.2%	2.5%	1.5%	4.1%	2.1%
Difference between Tax Levy Limit Plus Exclusions and Current Year Proposed Levy	131,719	74,877	15,645	11,244	87,041	44,465
Planning to Override the Cap	No	No	No	No	No	No

Mitigating the Impact of the Tax Levy Limit

1. Continually evaluate the efficiency and effectiveness of existing programs. Determine which programs or services should be supported with current resources, maintained at current levels, reduced or eliminated based on projected enrollment, demographic changes, and/or changes in Federal and State mandates, laws, regulations, contractual agreements, etc.
2. Continue to prepare a multi-year plan projecting the future costs of existing programs and services to determine whether existing revenue streams will be sufficient to cover these costs by the end of the planning period. The District's multi-year plan is updated each year and helps us understand the impact of today's budget decisions over time.
3. Conservatively manage unreserved fund balance in order to provide insurance against unanticipated expenditures or revenue shortfalls.
4. Develop a Reserves Fund Plan and annually review reserve fund balances to determine how much money should be reserved, how each reserve will be funded and when the balance will be used. Establishing reserve funds is necessary to provide a degree of financial stability during tough economic downturns.

Mitigating the Impact of the Tax Levy Limit

- Communicate more, not less and provide accurate facts to all the stakeholders in the community.
- Show the financial impact, short and long-term, of every budget decision.
- Continually monitor the budget and identify any significant variances as they occur and investigate the cause for the variance.
- Review comparative year to year data, budget vs. actual, and analyze trends.
- Gather other relevant data and research economic indicators that may impact the current and future budget(s).
- Always stay focused on the mission of the district:

“The Sag Harbor School District in partnership with all members of the community is committed to equity in education; its mission is to provide students with a safe, child-centered environment which fosters personal, academic, and creative excellence. This will empower students to become responsible and respectful members of a global society.”

As lifelong learners, students will be prepared to move successfully to the next stage of their lives.”

Budget Development Process:

Each year, we focus on Transparency because in today's environment of fiscal constraints, the District wants to send a powerful message to the community that taxes and spending need to be justified.

- Zero-based budgeting approach is a process that seeks to create greater transparency in how department budgets are developed by requiring detailed justification of every budget request in lieu of pointing to prior years' allocations as the justification (roll-over budget).

This focus on **Transparency** and **Zero-based** budgeting allows the District to maintain all existing programs and services which includes a 100% District funded Pre-k program, the prestigious and rapidly growing International Baccalaureate program, advanced placement courses, and numerous opportunities for students to participate in interscholastic athletics and extra-curricular clubs. The budget also includes funds to maintain and improve our facilities which will enhance the safe, child centered environment in our buildings.

Budget Development Process:

Every year we also focus on *Long-term Sustainability and Improvement* – How can we sustain and possibly improve current educational programs while staying at or below the Real Property Tax Cap?

- By expanding our district-wide zero-based budgeting process of reviewing each and every projected expenditure to determine and question:
 1. The need for the expenditure and;
 2. If it is needed, how can we obtain the item at a lower cost.

We participate in NYS, Suffolk County, BOCES and Educational Data Services, Inc. co-operative purchasing groups. Each of these purchasing co-operatives saves the District thousands of dollars each year in unit cost per item and labor. For example, by joining the Ed. Data co-operative purchasing group, the District saved \$38,947 in the first six months of this year and has realized savings of \$76,143 during the past 2.5 years.



"The Educated Way to Purchase"
www.ed-data.com



Sag Harbor UFSD
200 Jemain Avenue
Sag Harbor, NY 11963

January 27, 2017

Dear Board of Education:

For the past 3 years the Educational Data Services Cooperative Bidding Management Program has produced a total district dollar savings to date of **\$76,143**.

- In a **comparison** of our Cooperative Bid pricing with *National Coops, Regional BOCES Coops and State Coops*, Ed-Data's Cooperative Bidding efforts resulted in **savings of 41-59%**.
- In a **comparison** of our Cooperative Bid pricing with *State Contract* pricing, Ed-Data's Cooperative Bidding efforts resulted in **savings of 54-66%**.

For the **2016 - 2017 School Year** the district realized savings of **\$38,947**.
The savings consist of the following:

- General Classroom, Office and Computer, and Copy Duplicator Supplies: **\$21,966** or **42%** below state contract, National Coop or Regional BOCES pricing.
- Other Categories where applicable including (Science, I/A, Fine Art, Phys Ed, Health, AV, Athletic, Custodial, etc.) **\$16,980**.

Not included in the above savings are the clerical savings derived from our **online order entry procurement management system, customer service support, and customized district accounting software intergration to download, encumber and print all district purchase orders**, along with the elimination of all bid advertisements, bid mailings, bid openings and bid analysis.

Thank you for making this the most effective and **largest active district cooperative and shared services program** of its kind in the state!!

Sincerely,

A handwritten signature in black ink, appearing to be 'Alan Wohl'.

Alan Wohl
Educational Data Services, Inc.

Budget Development Process:

Every year we also focus on *Long-term Sustainability and Improvement* – How can we sustain and possibly improve current educational programs while staying at or below the Real Property Tax Cap?

- By keeping our costs as low as possible and asking our Administrative team to work hard to submit budgets that are essentially flat. Each Administrator was asked to rebuild their budgets from the ground up, justifying each line item and they were also asked to provide explanations for any significant cost drivers.
- By capturing savings throughout the year when opportunities for savings are detected. For example, this is accomplished by re-evaluating our staff levels after one of our employees retires, having our utility bills audited for errors and overcharges on an on-going basis – so far we have recouped close to \$12,500 back in credits from our utility companies, and sharing costs with our neighboring school districts.
- By finding additional revenue streams through Shared Transportation Services and Education Services with our neighboring school districts.

Budget Development Process:

District officials are committed to finding additional cost-savings and revenue streams in every area of our school district operations.

In addition, we will continue to keep the Budget Development Process completely **Transparent**.

All of our Presentations and a detailed line-by-line budget can be found at:

<http://sagharbor.ss9.sharpschool.com/cms/One.aspx?portalId=662344&pageId=7090338>

2017-2018 SCHOOL YEAR BUDGET INFORMATION

[2017-2018 School Year Budget Information](#)















[2016-2017 School Year Budget Information](#)

[2015-2016 School Year Budget Information](#)

[2014-2015 School Year Budget Information](#)

[2013-2014 School Year Budget Information](#)

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 2017-2018 Budget Newsletter	572 KB 
 2017-2018 Proposed Budget	609 KB 
 2017-2018 Proposed Budget Summary with Percentage Change	32.4 KB 
 2017-2018 Sag Harbor UFSD Budget Statement	1.14 MB 
 April 19, 2017 Budget Adoption Presentation	1.30 MB 
 April 3, 2017 Budget Workshop_5 Pierson, Athletics, Sped, BOCES, Debt Service, & Transfers	16.5 MB 

Sag Harbor UFSD Custom App:



2017/2018 Proposed Budget Adopted on April 19, 2017

DETAIL APPROPRIATION BUDGET REPORT BY FUNCTION

ACCOUNT	DESCRIPTION	2014-15 BUDGET	2014-15 EXPENSES	2015-16 BUDGET	2015-16 EXPENSES	2016-17 BUDGET	2016-17 EXPENSES	2017-18 NEW BUDGET	
	Pest Control		0.00	2,500					
	Emergency Fund and Insurance Ded		0.00	20,000					
A 1620.405	CONTRACTUAL-ARCHITECT	10,000	2,178	10,000	9,950	10,000	2,645	10,000	
	ARCHITECT FEES		0.00	8,000					
	Engineer Fees		0.00	2,000					
A 1620.411	CONTRACTUAL-FUEL	71,500	62,264	79,000	17,931	75,000	24,982	65,000	
	Heating Oil		0.00	65,000					
A 1620.412	CONTRACTUAL-ELECTRICITY	281,750	207,482	250,000	212,915	240,000	129,235	235,000	
	PSEG LONG ISLAND, LLC		0.00	235,000					
A 1620.413	CONTRACTUAL-GAS	83,000	46,034	80,000	45,548	75,000	38,824	70,000	
	NATIONAL GRID		0.00	70,000					
A 1620.414	CONTRACTUAL-CARTAGE & SEWAGE	35,000	27,452	35,000	33,325	37,500	22,214	40,000	
	SUBURBAN SANITATION & HAULING		0.00	40,000					
A 1620.415	CONTRACTUAL-WATER	8,500	6,921	7,500	7,506	8,000	5,452	9,000	
	SCWA		0.00	9,000					
A 1620.416	CONTRACTUAL-ALARMS	8,000	1,561	8,000	32,831	10,766	5,756	19,520	
	Burglar Alarm Service Contract		0.00	200					
	Fire Alarm Service Contract		0.00	6,700					
	Monthly Alarm Monitoring (Burg/F		0.00	840					
	Monthly Lockdown Monitoring		0.00	480					
	IAC Monitoring		0.00	8,400					
	Lockdown System Service Contract		0.00	400					
	Access Control System Service Co		0.00	800					
	CCTV Service Contract		0.00	1,200					
	Contingency for additional fees		0.00	500					
A 1620.417	CONTRACTUAL- SNOW REMOVAL	5,000	5,000	13,000	4,275	13,000	3,475	13,000	
	Snow Removal		0.00	8,000					
	Parking Lot Salt and Sand		0.00	5,000					
A 1620.418	CONTRACTUAL-CLOTHING ALLOWANCE	4,250	1,985	4,500	3,886	4,500	250	4,750	
	Contractual Uniform Allowance		0.00	4,750					
A 1620.419	CONTRACTUAL-EMERGENCY FUND	15,000	10,207	15,000	17,846	0	0	0	
A 1620.450	CUSTODIAL SUPPLIES	65,000	77,155	72,000	80,552	80,800	58,096	82,500	
	Paper Towels		0.00	14,000					
	Toilet Paper		0.00	6,000					
	Floor Products		0.00	21,000					
	Cleaners/Disinfectants		0.00	14,500					
	Liners		0.00	12,000					
	Hand Soap/Sanitizers		0.00	2,000					
	Miscellaneous Other Supplies		0.00	1,500					
	Supply Contingency		0.00	6,700					
	Automatic Hand Dryers		0.00	4,800					
A 1620.490	BOCES/OPERATION OF PLANT	4,510	4,499	5,612	30,413	29,257	6,349	28,659	
	618.120 Health/Safety Basic Svc		0.00	3,894					
	618.130 Health/Safety Basic Svc		0.00	1,233					
	618.110 Health & Safety Consultant		0.00	3,000					
	618.150 Health/Safety Specialist		0.00	20,532					
	1620....OPERATION OF PLANT	*	1,270,688	1,069,829	1,423,396	1,645,044	1,394,893	862,573	1,471,160
A 1621.160	MAINTENANCE OF PLANT NON-INSTRUC	561,678	559,253	370,329	387,953	416,968	296,559	420,888	
	Salary		1.00	69,912					
	Salary		1.00	73,434					
	Salary		1.00	64,043					
	Salary		1.00	68,648					
	Salary		1.00	64,531					
	Salary		1.00	73,434					
	Weekend Monitor		0.00	6,885					

2017/2018 Proposed Budget Adopted on April 19, 2017

DETAIL APPROPRIATION BUDGET REPORT BY FUNCTION

ACCOUNT	DESCRIPTION	2014-15 BUDGET	2014-15 EXPENSES	2015-16 BUDGET	2015-16 EXPENSES	2016-17 BUDGET	2016-17 EXPENSES	2017-18 NEW BUDGET
A 2110.140-04	REG SCHOOL INST SALARY SUB PRE K	0	3,835	10,000	1,240	10,000	963	7,500
A 2110.150	REG SCHOOL INSTR. SALARIES MISC	0	4,900	3,000	8,441	3,000	7,291	10,000
	Xtra Pay, Evening/Weekend Assign		10,000					
A 2110.151	REGULAR SCHOOL MENTORING	12,500	29,262	12,500	21,293	25,000	12,675	25,000
A 2110.152	REG SCHOOL INSTR. SALARY TUTOR	30,000	15,770	30,000	17,933	30,000	11,258	25,000
A 2110.160	REG SCHOOL NON-INSTR MONITOR	0	0	20,906	0	0	0	0
A 2110.160-01	REG SCHOOL NON-INSTR. MONITOR K-	64,097	43,530	42,875	54,541	62,275	34,666	65,734
	Salary		28,802					
	Salary		24,456					
	Salary		12,476					
A 2110.160-03	REG SCHOOL NON-INSTR. MONITOR 7-	36,550	45,691	33,436	39,017	42,124	20,311	33,788
	Salary		18,940					
	Salary		14,848					
A 2110.161-02	REG SCHOOL NON-INSTR. LUNCH 6	13,800	0	0	0	0	0	0
A 2110.161-03	REG SCHOOL NON-INSTR. LUNCH 7-12	27,600	(56)	0	0	0	0	0
A 2110.162	REG SCHOOL NON-INSTR. CLERICAL O	0	0	4,000	12,971	4,000	7,895	15,000
	Non-Instructional OT and Extra P		15,000					
A 2110.164	SALARY ADJUSTMENTS	0	0	0	0	0	0	135,654
	Contingency for 1 New Hire		40,000					
	Salary Adjustments		95,654					
A 2110.201	REGULAR SCHOOL EQUIPMENT -ELEM	12,125	12,019	12,200	10,553	11,500	4,887	11,500
	Replacement Desks & Chairs		5,000					
	Instrument Replacements		3,000					
	Misc. Classroom equipment		2,500					
	Bulletin Boards, White boards		1,000					
A 2110.202	REGULAR SCHOOL EQUIPMENT- MS	7,525	7,419	2,143	1,083	5,000	4,960	5,000
	CONTINGENCY TEACHERS EQUIPMENT		5,000					
A 2110.203	REGULAR SCHOOL EQUIPMENT -HS	7,525	6,963	11,933	9,448	10,886	10,185	13,430
	Marchisella - Equipment		1,000					
	Schumacher, Rob/Rich - Equipment		2,500					
	NURSE- HS/MS EQUIPMENT		830					
	Garvey		1,000					
	Remson		2,700					
	Schulman, Clint		1,300					
	Bartolotto		200					
	Fujita		2,200					
	Schulman, Gary		200					
	Solow		500					
	Library- HS/MS Equipment		1,000					
A 2110.204	REGULAR SCHOOL EQUIPMENT -PE	200	0	2,000	2,000	2,000	1,996	2,000
A 2110.401	REGULAR SCHOOL CONTRACTUAL - ELE	46,450	37,713	52,000	40,973	54,450	29,102	54,450
	Tennis Instruction-Annacone Tenn		1,600					
	Peconic Teacher Center Fee		6,950					
	Science Curriculum - Field trips		7,500					
	YMCA Swimming		12,000					
	K/5 Buddy Trip Buckskill Skating		1,000					
	Instrument Repairs		1,500					
	Teacher Conference		16,000					
	Miler's Club Recognition		1,000					
	Foundations Staff Development		2,400					
	Curriculum Dev Project		2,500					
	W.H. Beach Performing Arts		2,000					
A 2110.403	REGULAR SCHOOL CONTRACTUAL HS/MS	76,480	62,658	121,883	95,417	118,865	93,449	141,975
	Federico - Conf/Contractual		200					
	Mannino - Contractual		775					
	Terry/Masters - Conferences		700					
	Duff - Conf/Contractual		1,300					
	Other Contractual		115,000					
	Mallia		600					

*2017-18 Proposed Budget Highlights: Reinvesting in **OUR** Schools*

- Classroom technology is being enhanced by including a class set of Chromebooks for every Middle/High School class at Pierson
- Includes funding for a significant increase in IB participation, including professional development for teachers and administrators, and also IB participation and testing fees
- Provides additional funds for a NYS mandated ENL teacher
- Continued investment in physical education, which includes cardio and weight room equipment
- Planning for an additional elementary special education section and hiring additional support staff to support the class so students can remain within the District
- Two new custodial positions will reduce the need for substitutes
- One new clerical position to meet the increasing reporting requirements in the area of payroll and human resources

2017-18 Proposed Budget Highlights:

*Reinvesting in **OUR** Schools*

- A total of nearly \$20,000 will go toward replacing older equipment. Some of the equipment being replaced in the Facilities Department will improve employee productivity and efficiency
- \$25,000 is included to replace the padding in the middle school gym and \$19,500 has been budgeted for repair and maintenance projects listed in the District's Building Condition Survey. These facility upgrades are needed to comply with NYSED standards for the health and safety of our students and staff
- \$40,000 is being set aside for a new theatrical lighting system and separate switching for the gym lights at the Sag Harbor Elementary School



Reinvesting in Our Schools

2017-18 Proposed Budget Under Tax Cap Limit

The Board of Education and administration of the Sag Harbor School District are pleased to present the proposed 2017-18 budget, which focuses on reinvesting in our facilities and maintaining our educational excellence while remaining under the state-mandated tax cap.

The proposed budget, which carries a tax levy increase of 3.49 percent, maintains all existing programming while providing funding to enhance students' educational experiences.

Specifically, the proposed \$39.9 million budget includes an investment in technology in the form of Chromebook carts at the Middle/High School building. With this investment,

The proposed budget carries a 2.92 percent increase over the 2016-2017 budget and provides for support for special education programming that places an emphasis on keeping students within the district. Through the budget, funding is made available to strengthen the Elementary School special education program by preparing new special education classrooms and hiring support staff.

Additionally, the prestigious and rapidly-growing International Baccalaureate program, as well as green initiatives and STEAM-related clubs and activities, will continue to be supported and invested in through the budget.

The spending plan also continues the reinvestment in the district's facilities. The funding is budgeted toward replacing older equipment, including the padding in the Middle School gymnasium, and investment in a long-term maintenance plan developed by the district.



"We believe it is necessary to reinvest in our school facilities to ensure that our Sag Harbor Schools remain a safe and a quality educational institution," said Superintendent Graves.

The proposed budget plan also asks voters to consider two separate propositions, which you can learn about on pages 2 and 5.

For additional information on the proposed 2017-2018 budget and the

PROPOSED BUDGET EXPENDITURES 2017-2018

	Voter-Approved 2016-17 Budget	Proposed 2017-18 Budget	\$ Change	% Change
ADMINISTRATION AND PROGRAM SUPPORT				
Board of Education/District Clerk/Annual Meeting	\$66,059.00	\$99,224.00	\$33,165.00	50.21%
Chief School Administrator	\$308,957.00	\$315,098.00	\$6,141.00	1.99%
Business/Finance/Legal/Auditing/Insurance	\$1,056,555.89	\$1,166,932.12	\$110,376.23	10.45%
BOCES Services - Administrative Charges	\$132,355.00	\$134,618.00	\$2,263.00	1.71%
PROGRAMS FOR STUDENTS				
Teaching/Co-Curricular/Educational Support	\$15,394,625.28	\$15,700,806.12	\$306,180.84	1.99%
Special Education and Related Services	\$4,621,969.85	\$4,820,270.66	\$198,300.81	4.29%
Occupational Education	\$195,651.00	\$159,912.00	(\$35,739.00)	-18.27%
Technology/Instructional Media	\$1,114,894.49	\$1,113,652.84	(\$1,241.65)	-0.11%
Athletics	\$767,175.71	\$776,607.05	9,431.34	1.23%
Pupil Transportation	\$956,739.76	\$1,351,481.35	\$394,741.59	41.26%
Transfer to Special Aid/Lunch Fund	\$55,000.00	\$75,000.00	\$20,000.00	36.36%
EMPLOYEE BENEFITS				
Retirement/Social Security/Compensated Absences	\$4,486,939.60	\$4,241,177.21	(\$245,762.39)	-5.48%
Workers' Compensation/Unemployment/Disability	\$206,030.00	\$138,811.00	(\$67,219.00)	-32.63%
Health and Dental Insurance/125 Plan Admin.	\$4,783,697.01	\$5,276,252.74	\$492,555.73	10.30%
CAPITAL BUDGET				
Debt Services	\$2,116,458.00	\$2,175,518.76	\$59,060.76	2.79%
Operations and Maintenance	\$2,167,881.05	\$2,321,748.15	\$153,867.10	7.10%
Transfer to Capital Fund	\$343,000.00	\$40,000.00	(\$303,000.00)	-88.34%
TOTAL BUDGET	\$38,773,988.64	\$39,907,110.00	\$1,133,121.36	2.92%

PROPOSED BUDGET REVENUES 2017-2018

	Voter-Approved 2016-17 Budget	Proposed 2017-18 Budget	\$ Change	% Change
SUMMARY OF STATE AID				
Foundation Aid	\$1,188,290	\$1,220,849	\$32,559	2.74%
Building Aid	\$163,312	\$163,313	\$1	0.00%
Transportation Aid	\$43,821	\$44,241	\$420	0.96%
BOCES Aid/Special Services Aid	\$172,123	\$131,159	(\$40,964)	-23.80%
Software/Library/Textbook Aid	\$80,478	\$79,133	(\$1,345)	-1.67%
High Cost Excess Cost/Private Excess Cost Aid	\$39,276	\$42,594	\$3,318	8.45%
High Tax Aid	\$165,430	\$165,430	\$0	0.00%
Payments in Lieu of Taxes	\$140,000	\$150,000	\$10,000	7.14%
Out-of-District Tuition	\$440,000	\$450,000	\$10,000	2.27%
Charges for Services/Facilities Usage	\$249,281	\$250,000	\$719	0.29%
Grants, Interest, Miscellaneous Revenue	\$121,017	\$150,000	\$28,983	23.95%
General Fund Tax Levy	\$35,065,000	\$36,288,769	\$1,223,769	3.49%
Appropriation from ERS Reserve	\$500,000	\$500,000	\$0	0.00%
Appropriated Fund Balance	\$405,961	\$271,622	(\$134,339)	-33.09%
TOTAL REVENUE	\$38,773,989	\$39,907,110	\$1,133,121	2.92%



Sag Harbor UFSD 2017-2018 Budget Statement

1. Proposed budget in three-part format separated into three components (administrative, program and capital), prepared in plain language
2. Property Tax Report Card
3. School Academic Report Cards
4. District's Fiscal Accountability Summary
5. Administrative Compensation Disclosure Notice
6. Exemption Report for both the Town of Southampton and the Town of East Hampton

2017-18 Proposed Budget by Function

ACCOUNT GROUP	2016-17 BUDGET	2017-18 PROPOSED BUDGET	\$ CHANGE	% CHANGE
1000 - 1999 GENERAL SUPPORT	\$4,153,564.93	\$4,402,562.61	\$248,997.68	5.99%
2000 - 2999 INSTRUCTION	\$21,486,256.56	\$22,026,935.42	\$540,678.86	2.52%
5000 - 5999 TRANSPORTATION	\$956,739.76	\$1,351,481.35	\$394,741.59	41.26%
7000 - 8999 COMMUNITY SERVICES	\$186,302.78	\$179,370.91	(\$6,931.87)	-3.72%
9000 - 9099 EMPLOYEE BENEFITS	\$9,476,666.61	\$9,656,240.95	\$179,574.34	1.89%
9700 - 9799 DEBT SERVICE	\$125,000.00	\$191,000.00	\$66,000.00	52.80%
9900 - 9999 INTERFUND TRANSFERS	\$2,389,458.00	\$2,099,518.76	(\$289,939.24)	-12.13%
GRAND TOTALS:	\$38,773,988.64	\$39,907,110.00	\$1,133,121.36	2.92%

- **General Support** - includes appropriations for the Board of Education, District Clerk, the Superintendent's Office, the Business Office, and Facilities.
- **Instruction** - includes appropriations for all regular elementary and secondary instruction as well as expenditures for special education programs, extracurricular activities (clubs, intramurals, etc.) and interscholastic athletics.
- **Transportation** - includes appropriations for all student transportation, either with our own buses or by contract with private companies.
- **Community Services** - includes appropriations for security guard salaries and YARD.
- **Debt Service** - includes BAN & TAN Interest ONLY. All of our other Debt is included in Inter-fund Transfers to our Debt Service Fund.
- **InterFund Transfers** - includes transfers to the School Lunch Fund, Special Aid Fund (for summer school), and the Debt Service Fund.

2017-18 Impact of a 3.49% Tax Levy Increase

Actual and Projected Change in Tax Rate per 1,000 and Tax Levy										
Town Of East Hampton	Taxable Assessed Value	Equalization Rate	Market or Full Value Home in District	Rate Per \$1000 Assessed Value	Dollar Δ in Rate	Percent Δ in Rate	School Tax in Real Dollars	Dollar Δ in Taxes	Percent Δ in Taxes	Monthly Impact
2013/2014	\$6,400	0.73%	\$876,712	721.7200			\$4,619.01			
2014/2015	\$6,400	0.73%	\$876,712	715.0500	(\$6.67)	-0.92%	\$4,576.32	(\$42.69)	-0.92%	(\$3.56)
2015/2016	\$6,400	0.64%	\$1,000,000	792.7000	\$77.65	10.86%	\$5,073.28	\$496.96	10.86%	\$41.41
2016/2017	\$6,400	0.59%	\$1,084,746	834.2228	\$41.52	5.24%	\$5,339.03	\$265.75	5.24%	\$22.15
2017/2018	\$6,400	0.59%	\$1,084,746	862.1079	\$27.89	3.34%	\$5,517.49	\$178.46	3.34%	\$14.87

Actual and Projected Change in Tax Rate per 1,000 and Tax Levy										
Town Of Southampton	Taxable Assessed Value	Equalization Rate	Market or Full Value Home in District	Rate Per \$1000 Assessed Value	Dollar Δ in Rate	Percent Δ in Rate	School Tax in Real Dollars	Dollar Δ in Taxes	Percent Δ in Taxes	Monthly Impact
2013/2014	\$1,000,000	100.00%	\$1,000,000	5.2477			\$5,247.70			
2014/2015	\$1,000,000	100.00%	\$1,000,000	5.2176	(\$0.03)	-0.57%	\$5,217.60	(\$30.10)	-0.57%	(\$2.51)
2015/2016	\$1,000,000	100.00%	\$1,000,000	5.0717	(\$0.15)	-2.80%	\$5,071.70	(\$145.90)	-2.80%	(\$12.16)
2016/2017	\$1,000,000	100.00%	\$1,000,000	4.9219	(\$0.15)	-2.95%	\$4,921.90	(\$149.80)	-2.95%	(\$12.48)
2017/2018	\$1,000,000	100.00%	\$1,000,000	5.0864	\$0.16	3.34%	\$5,086.40	\$164.50	3.34%	\$13.71

This projection assumes that 2017-2018 Assessed Values will remain the same as the 2016-2017 Assessed Values.

2017-18 Impact of a 3.49% Tax Levy Increase After Projected Property Tax Rebate

NYS Tax Law Section 606 (n-1)

Qualified Gross Income: Basic STAR	2017/18	Town of East Hampton - Projected Tax Increase \$178.46		Town of Southampton - Projected Tax Increase \$164.50	
	% of Basic STAR	Basic STAR - \$298	Projected Tax Increase After Rebate	Basic STAR - \$264	Projected Tax Increase After Rebate
Not Over \$75,000	28%	\$ 83.44	\$ 95.32	\$ 73.92	\$ 90.58
Over \$75,000 but not over \$150,000	20.50%	\$ 61.09	\$ 117.67	\$ 54.12	\$ 110.38
Over \$150,000 but not over \$200,000	13%	\$ 38.74	\$ 140.02	\$ 34.32	\$ 130.18
Over \$200,000 but not over \$275,000	5.50%	\$ 16.39	\$ 162.37	\$ 14.52	\$ 149.98
Over \$275,000	No Credit	No Credit	\$ 178.46	No Credit	\$ 164.50

Enhanced STAR	2017/18	Town of East Hampton - Projected Tax Increase \$178.46		Town of Southampton - Projected Tax Increase \$164.50	
	% of Enhanced STAR	Enhanced STAR - \$635	Projected Tax Increase After Rebate	Enhanced STAR - \$574	Projected Tax Increase After Rebate
	12%	\$ 76.20	\$ 102.26	\$ 68.88	\$ 95.62

This projection assumes that 2017-2018 Assessed Values will remain the same as the 2016-2017 Assessed Values.

Additional Propositions on the Ballot:

1) Establish New Bus Purchase Reserve: Voters are being asked to consider a proposition that would allow the district to establish a reserve fund – the Transportation Fleet Capital Reserve Fund – that would permit the purchase of new or replacement buses in its fleet, in the future. The fund would streamline the current legal mechanism for the purchase or replacement of buses and ensure that the transportation needs of the district are met. If approved, the Transportation Fleet Capital Reserve Fund would have a cap of \$2 million and will be funded by year-end budgetary surplus and a previous Bus Fleet Replacement Reserve Fund that will be closed out. That fund, which was established by voters in 2010, currently has \$400,000 available for transfer. **No additional funds are required from taxpayers.**

Additional Propositions on the Ballot:

2) Expend From Existing Capital Reserve for District-wide

Window Replacements: If approved, the proposition will allow the district to spend \$1.2 million from its existing Capital Reserve Fund for the replacement of windows at the Sag Harbor Elementary School and Pierson Middle/High School. The installation of more Energy Efficient windows will reduce heating costs and provide a better more comfortable learning environment for students. The district currently holds permits from the New York State Education Department for the project; and requires the funds necessary for the completion of the work before the permit expires in January 2018. The approval of the proposition **will not result in additional taxes for residents** as the fund, which was approved by the community in 2011, was established and has been funded with the purpose of repairing and maintaining the district's facilities. To spend the funds, the district, by law, is required to obtain taxpayer approval.

On the Ballot

PROPOSITION NO. 1 - Budget 2017-18

RESOLVED, that the Board of Education of the Sag Harbor Union Free School District, Sag Harbor, New York, be and is hereby authorized to expend the sums set forth in the proposed budget for the 2017-18 school year in the total amount of \$39,907,110.00 and to levy the necessary tax therefor.

PROPOSITION NO. 2 - Establish a Transportation Fleet Capital Reserve Fund:

Shall the Board of Education of the Sag Harbor Union Free School District, pursuant to Section 3651 of the Education Law, be authorized to establish a reserve fund to be known as the Transportation Fleet Capital Reserve Fund: that the purpose of the reserve fund shall be to finance, in whole or in part, the purchase of busses to replace and/or add to Sag Harbor's fleet of busses; that the reserve shall be in an amount not to exceed \$2,000,000; that the probable term of the reserve fund shall be 15 years; and the reserve fund shall be funded by transferring the remaining balance from the School District's Sag Harbor Bus Fleet Replacement Capital Reserve Fund, which as previously established following the approval of a proposition by the voters of the School District on May 18, 2010, and, therefore, the reserve fund shall be funded in any year during the probable term, with such funds to be obtained from end of budget year surplus funds and/or budget appropriations.

PROPOSITION NO. 3 - Expend From Existing Facilities Capital Reserve Fund:

Shall the Board of Education of the Sag Harbor Union Free School District be authorized to undertake certain capital improvements consisting of window replacements at the Sag Harbor Elementary and Pierson Middle/High School at an estimated maximum aggregate cost of \$1,200,000 and to appropriate and expend such amount from the Facilities Capital Reserve Fund, which was previously established following approval of a proposition by the voters of the School District on May 17, 2011.



Elect Members to the Board of Education

To elect three (3) members of the Board of Education for three (3) year terms commencing July 1, 2017 and expiring on June 30, 2020.

Vote for any three (3) candidates:

Theresa M. Samot Sandi Kruel January Kerr Alex Kriegsman Diana Kolhoff

Historical Budget Vote Results

SAG HARBOR UFSD BUDGET VOTE RESULTS								
School Year	Date of Vote	YES	NO	Total	Difference	%Pass	Tax Levy Increase	Tax Levy Limit
2004/05	May 18, 2004	735	674	1,409	61	52.16%	8.00%	N/A
2005/06	May 17, 2005	765	545	1,310	220	58.40%	6.90%	N/A
2006/07	May 16, 2006	727	719	1,446	8	50.28%	1.05%	N/A
2007/08	May 15, 2007	909	733	1,642	176	55.36%	1.89%	N/A
2008/09	May 20, 2008	893	424	1,317	469	67.81%	1.83%	N/A
2009/10	May 19, 2009	1,211	599	1,810	612	66.91%	3.86%	N/A
2010/11	May 18, 2010	1,051	1,020	2,071	31	50.75%	11.58%	N/A
2011/12	May 17, 2011	917	698	1,615	219	56.78%	4.69%	N/A
2012/13	May 15, 2012	892	420	1,312	472	67.99%	1.94%	2.09%
2013/14	May 21, 2013	825	377	1,202	448	68.64%	3.78%	4.06%
2014/15	May 20, 2014	578	222	800	356	72.25%	1.48%	1.51%
2015/16	May 19, 2015	720	246	966	474	74.53%	2.49%	2.53%
2016/17	May 17, 2016	997	328	1,325	669	75.25%	2.98%	3.20%
13 Year Average - Voter Approval & Average Tax Levy						62.85%	4.04%	2.68%

Sag Harbor UFSD
Budget Vote and Election

Tuesday, May 16, 2017

Pierson High School

Gymnasium

7:00 am - 9:00 pm



A big THANK-YOU to all the members of the Sag Harbor School District, who continually show their support for the funding of our schools each year!!!

