

# POTSDAM CENTRAL SCHOOL DISTRICT



## School Advocacy Toolkit

### PCS: A Tradition of Excellence

The Potsdam Central School District, located in rural St. Lawrence County at the foothills of the Adirondack Mountains, provides a high quality education to more than 1,300 students in grades pre-kindergarten through 12. Centered in Potsdam, a village of 10,000 residents, the district is within a short driving distance of the St. Lawrence River and the Canadian border. It is host to two institutions of higher learning, SUNY Potsdam and Clarkson University, which offer dynamic cultural and educational experiences to the local community. This includes the celebrated Crane School of Music whose collaboration with PCS has helped to provide a premier music program with many graduates seeking careers in the field. With its local resources and dedicated staff, Potsdam Central School has become a high-performing district with a tradition of excellence in academics, music, arts, extra-curricular activities, and athletics.

For the fourth consecutive year, the publication *Business First* ranked Potsdam Central School as one of the top state schools based on academic performance over four years.

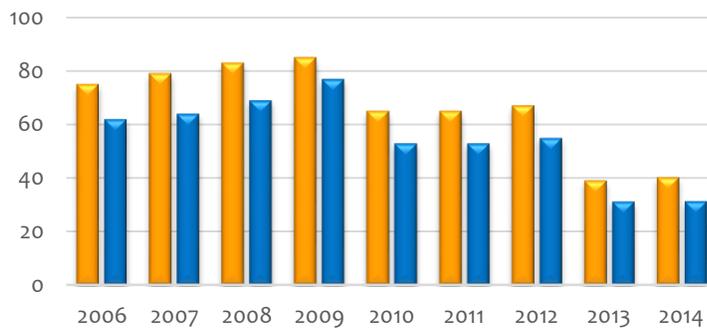
Potsdam was ranked 44<sup>th</sup> out of 432 upstate schools and 1<sup>st</sup> out of 33 schools in the “Watertown Area.” Potsdam High School earned a silver medal in the national school rankings by *U.S News & World Report*. Potsdam was ranked 106<sup>th</sup> out of 1,149 high schools in NYS and 1,342<sup>nd</sup> out of 21,035 nationally.

The A.A. Kingston Middle School has been a nationally-recognized Schools to Watch® (STW) school since 2009. It is one of only 27 middle schools in New York State and one of only 325 schools in the country to be honored with this designation for academic excellence, development responsiveness, social equity, and organizational support.

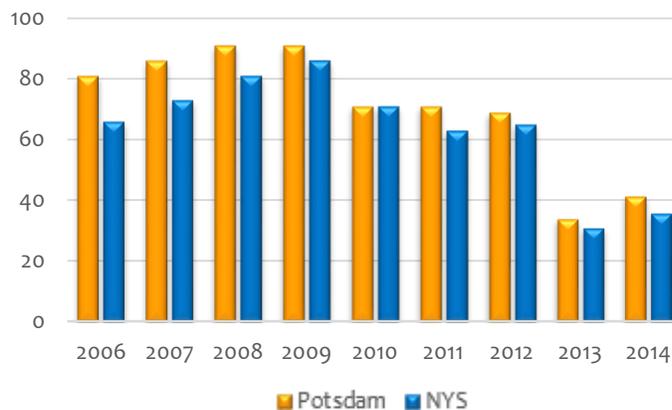
Student performance on the grades 3-8 math and English Language Arts New York State assessments as well as on high school New York State Regents Exams is consistently above the New York State average and generally at the top or near the top in the region. The table below illustrates the results on the 3-8 English Language Arts and Math exams as compared with the state average and Regents Exam passing rates as compared with the regional average.

NYS Regents Exam Passing Rates	PCS	Regional Ave
English	85%	83%
Algebra I	93%	85%
Geometry	81%	91%
Algebra2/Trigonometry	90%	73%
Global History	87%	74%
U.S. History	89%	88%
Earth Science	97%	84%
Living Environment	91%	94%
Chemistry	86%	78%
Physics	95%	82%
High School Graduation Rate 2013-14	94%	81%

**NYS 3-8 English Language Arts % Proficient**



**NYS 3-8 Math % Proficient**



\*Cut Scores across New York State were adjusted in 2010; 2013 was the first year that Common Core Assessments were administered.

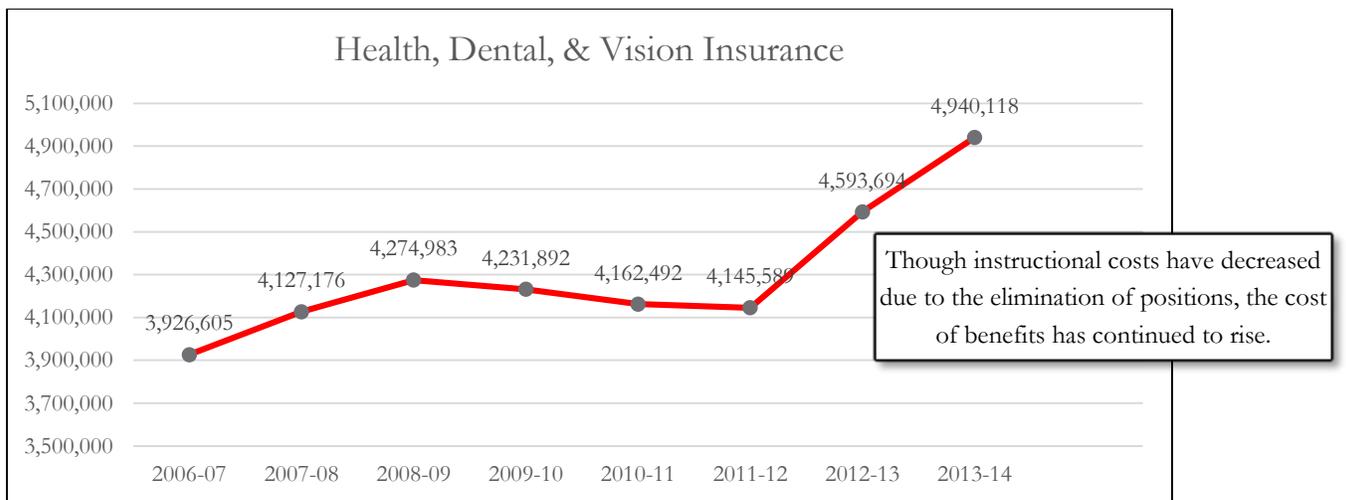
Like many school districts, one of the greatest challenges facing the Potsdam Central School District is the ability to maintain fiscal solvency and provide a quality education for our children as costs continue to rise and funding has been reduced. New York State law calls for our elected officials to adopt a state budget by April 1. Therefore, we need to act now!

## Issues Impacting Potsdam CSD

### Increased Costs

The largest drivers of the school budget are locally-negotiated employee salaries and benefits (health insurance, retirement contributions, etc.) The tables below illustrates the impact of these costs over the past several years.

	2008-09	2009-10	2010-11	2011-12	2012-13	2013-2014
<b>Instructional Salaries</b>	\$7,255,989	\$7,487,159	\$7,041,224	\$6,486,145	\$6,733,659	6,633,159
<b>Non-Instructional Salaries</b>	\$2,364,919	\$2,444,376	\$2,289,968	\$2,196,009	\$1,980,891	2,096,063
<b>Employee Retirement System (ERS)</b>	\$206,694	\$222,476	\$330,676	\$414,374	\$444,919	515,980
<b>Teachers' Retirement System (TRS)</b>	\$586,962	\$707,508	\$659,049	\$505,758	\$813,904	1,175,523
<b>Health Insurance</b>	\$4,274,982	\$4,231,892	\$4,162,492	\$4,145,589	\$4,593,694	4,940,118
<b>Total</b>	\$14,689,201	\$15,105,010	\$14,476,435	\$13,747,877	\$14,591,340	15,360,813
<b>% Change from Prior Year</b>		2.8%	-4.2%	-5.1%	6.2%	5.3%



Both the Teachers' Retirement System (TRS) and Employee Retirement System (ERS) are heavily invested in the stock market. Therefore, the economic downturn resulted in significant increases in retirement contribution rates. School districts are required to pay the state-determined percentage of the total salaries for employees who participate in the retirement system. The table below illustrates the employer contribution rates since 2009-10.

### District's Contribution to the Retirement System as % of Total Payroll

	<b>Teachers' Retirement System (TRS) Percentage of payroll contribution</b>	<b>Employee Retirement System (ERS) Percentage of payroll contribution</b>
<b>2009-10</b>	6.19%	7.14%
<b>2010-11</b>	8.62%	11.9%
<b>2011-12</b>	11.11%	16.3%
<b>2012-13</b>	11.84%	11.9%
<b>2013-14</b>	16.26%	20.9%
<b>2014-15</b>	17.53%	20.1%

### Reduced Funding

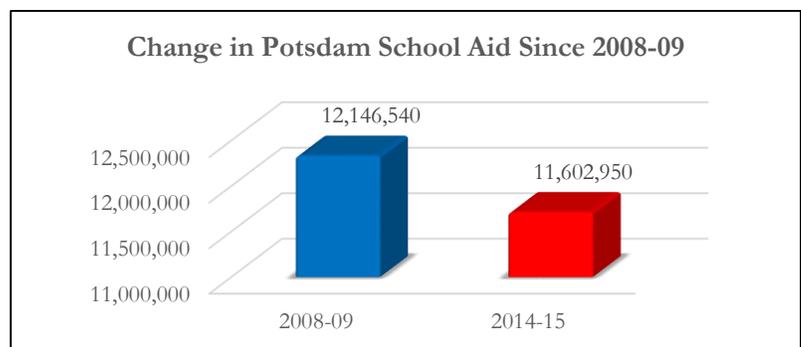
Since the 2009-10 school year, the state has deducted from each school district's state aid allocation an amount known as the Gap Elimination Adjustment (GEA) to help the state fill its revenue shortfall. For Potsdam Central Schools, this has resulted in **9.5 million dollars of unrealized state aid over a five year period or a \$7,552 per-pupil cut.**

Potsdam's per-pupil funding reduction is the highest in St. Lawrence County and one of the highest in the state. The average per-pupil cut across New York State for the same time period was \$3,546; **Potsdam's reduction was more than double the state average. During the 2014-15 school year alone, Potsdam's GEA per student was -\$970 or 2.5 times more than the state average of -\$386.**

Potsdam CSD GAP/Deficit Reduction Assessment	
School Year	GEA Reduction
2010-11	\$1,927,095
2011-12	\$2,562,183
2012-13	\$2,264,960
2013-14	\$1,584,821
2014-15	\$1,229,351
<b>Total</b>	<b>\$9,568,410</b>
Potsdam Per-Pupil Cut	<b>\$7,552</b>
Ave. NYS Per-Pupil Cut	<b>\$3,546</b>

School District	Total GEA Loss (2010-11 through 2014-2015)	Average Per-pupil cut (2010-11 through 2014-15)	GEA for 2014-15 per student
<b>Potsdam</b>	<b>-9,568,410</b>	<b>-7,552</b>	<b>-970</b>
Canton	-9,142,325	-7,314	-929
Massena	-8,296,913	-2,934	-122
Ogdensburg	-6,465,966	-3,967	-177
Gouverneur	-5,517,979	-3,436	-143
Norwood-Norfolk	-3,854,228	-3,801	-163
Brasher Falls	-3,724,778	-3,655	-163
Madrid-Waddington	-2,631,731	-3,809	-168
Heuvelton	-2,369,686	-4,797	-214
Edwards-Knox	-2,323,993	-4,150	-178
Parishville-Hopkinton	-2,063,222	-4,585	-389
Clifton-Fine	-1,995,233	-6,651	-470
Lisbon	-1,877,560	-3,237	-132
Colton-Pierrepont	-1,832,951	-5,932	-723
Hermon-Dekalb	-1,777,124	-4,580	-191
Morristown	-1,653,680	-4,698	-205
Hammond	-1,286,540	-4,177	-186
<b>NYS State Average</b>		<b>-3,546</b>	<b>-386</b>

Potsdam Central School's New York State aid (excluding Building Aids) in the 2014-15 school year is \$543,590 less (-4.5 %) than it was six years ago. (This reduction does not include inflation which would further increase the gap in funding.)



## Potsdam Central's Response

The reduction in revenue over the last five years has resulted in many hard programming, staffing, and budgetary decisions. **To address this gap, the district has employed three main strategies: reducing staff, seeking opportunities for savings through shared services, and applying significant amounts of fund balance to the budget.** Finally, the district engaged in a school merger feasibility study with a neighboring school district, Canton, to determine whether a merged district would be able to provide increased educational opportunities for students at a reduced cost to the taxpayers.

From 2008-09 until 2013-14, the Potsdam Central School District reduced the teaching faculty by 34.8 full-time equivalent positions, a number reflecting 27% of the instructional staff. In addition, 13.4 FTE support staff positions were cut, for a total loss of **48.2 positions**, a 15.7% reduction in the number of personnel employed by the district. As a result, class sizes have increased and the number of course offerings available to high school students has been significantly reduced.

There have also been reductions in programming such as summer school, the learn-to-swim program, a middle school mentoring program, and in extra-curricular activities and athletics. With increases in state aid during the last two years, the district was able to add an elementary teacher and a 0.5 reading teacher to meet student needs. However, recent state aid projections for the 2015-16 budget has placed these and other positions in jeopardy of being eliminated.

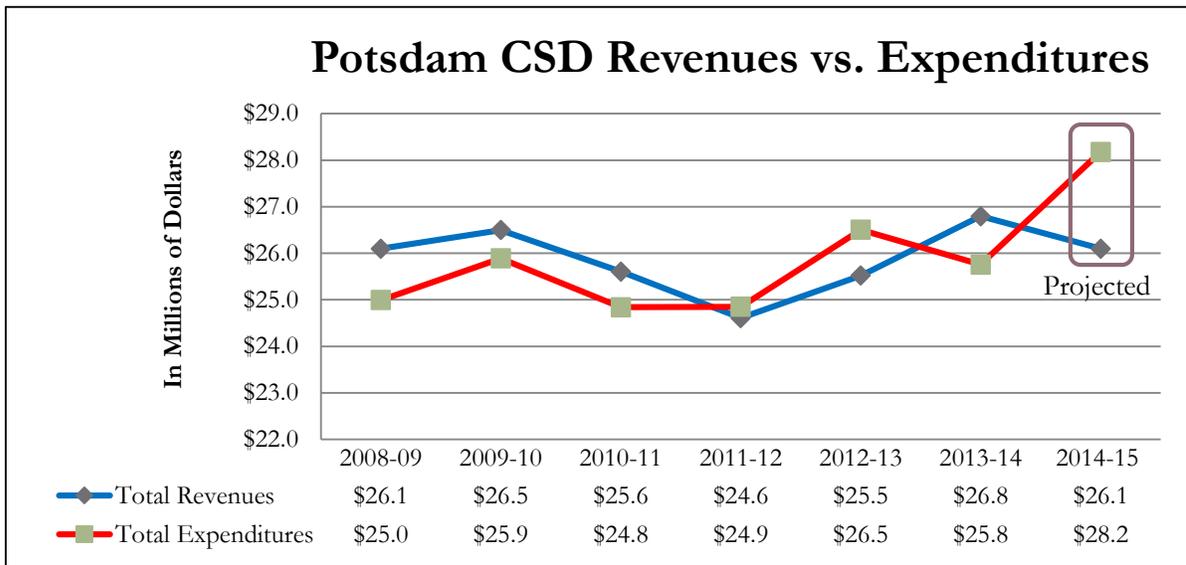
In addition to reducing staff, the Potsdam Central School District has also sought savings through shared services. The District now

shares a Music Teacher, a Family & Consumer Science Teacher, Accounts Payable Clerk, Food Service Director, and a Buildings and Grounds Supervisor with neighboring school districts. These arrangements help Potsdam CSD to save money as it lowers the responsibility for salary and benefits on these employees while maximizing BOCES aid.

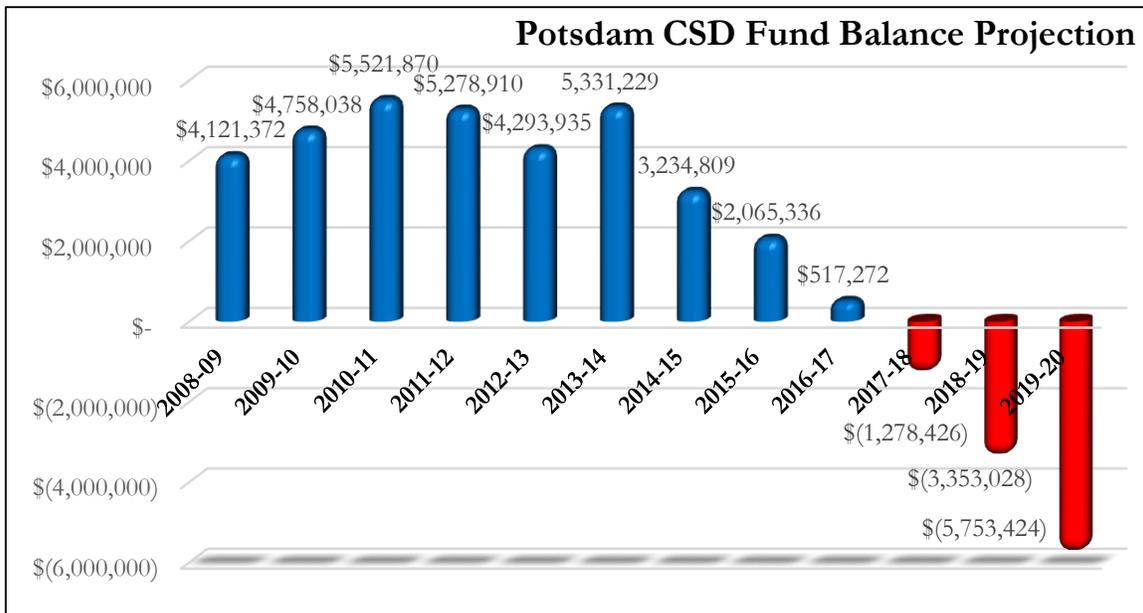
<b>Instructional Positions Reduced 2007-14</b>	<b># Cut</b>
Elementary Teachers (PreK-6)	2.5
Secondary Core Teachers	6.3
Special Education Teachers	2.0
Physical Education Teachers	0.5
Secondary Foreign Language Teachers	0.5
Family & Consumer Science Teachers	1.5
Business Teachers	1.0
Library Media Specialists	2.0
Music Teachers	1.5
Art Teachers	1.0
Teaching Assistants	16
<b>Total Instructional Positions</b>	<b>34.8</b>

<b>Support Positions Reduced 2007-14</b>	<b># Cut</b>
Dean of Students	0.5
Educational Technology	0.2
Custodians	2.5
Secretaries	3.0
District Accounts Clerk	0.4
Food Service Director	0.4
Superintendent of Bldgs & Grounds	0.4
Social Worker	1.0
Cashier	1.0
Study Hall/Cafeteria Monitors	4.0
<b>Total Support Positions</b>	<b>13.4</b>
<b>Total Personnel Reductions</b>	<b>48.2</b>

<b>Programs &amp; Courses Eliminated or Reduced Due to Cuts in State Aid 2007-14</b>	
<b><u>Eliminated</u></b>	
Wind Ensemble	Sculpture
Advanced Photo	College Marketing
Summer School (Middle Level)	Keyboarding
Learn to Swim	Housing & Environment
Choices Program (Middle Level After School Tutoring)	Textiles & Clothing
Family & Consumer Science (Middle Level)	Accounting
Business Law	Entrepreneurship (Paul Smith's)
AP Environmental Science	Sports Management
Intro. to Mktg. & Sales	Sports Mktg.
Child Development	Independent Living
Food & Nutrition	Nutritional Science
Calc III AP/Calc BC	Parenting
Veterinary Science	Latin
Driver Education	
<b><u>Reduced</u></b>	
Elementary Title 1 Program	Library Services (2 of 3 Librarians cut)



Although the deep cuts to both staff and programming has helped to close the gap, expenditures have exceeded revenues in the 2011-12, 2012-13, and 2014-15 (projected) school years. Therefore, the district has been forced to apply fund balance to the tax levy and to also appropriate funds from various reserve accounts, including the Debt Service Fund, Retirement Contribution, and the Unemployment Reserve in order to make up the difference and put forth a balanced budget. Clearly, this is not a sustainable solution. In fact, according to information provided in the Merger Feasibility Study, the Potsdam Central School District is projected to completely deplete its fund balance by the end of the 2017-18 school year.



## Potsdam Central's Legislative Advocacy Priorities 2015-16

### **Eliminate the GEA in the 2015-16 State Budget**

Since the Deficit Reduction Assessment was first introduced in 2009-10 followed by the Gap Elimination Adjustment, the Potsdam Central School District has been significantly shortchanged in state funding. Over that time period, the district have lost over \$9.5 million in state aid resulting in the elimination of approximately 50 staffing positions and

numerous programs for our students. As arbitrarily declared an “average needs district” in the Department of Budget’s Needs Resource Category, **PCS faced the brunt of the state’s gap closing measures since 2010-11 with a per student reduction of \$7,552 compared to the state average of \$3,546. That is over 100% above the state average, a disparity which has widened over time. The current GEA for Potsdam in the 2014-15 budget is \$970 per student while the state average is \$386 or over 140% less.** This situation cannot stand if we are to provide a high quality education to our students so they can be justly competitive with others from around the state and beyond.

Given this disparity and the projected state budget surpluses through 2018, we are requesting that the remainder of the Gap Elimination Adjustment be removed in the 2015-16 state budget. This would provide an additional \$1.036 billion in state aid to schools and \$1.229 million to PCS in particular. The GEA was originally intended to be a stopgap measure to help the state through a very challenging economic period in its history. Schools like Potsdam have done their share to help the state in meeting its fiscal crisis and it is now time for the Governor and state legislature to adequately support our schools by immediately ending this destructive GEA.

### **Provide an Increase of \$2 Billion in Direct Education Funding in the 2015-16 State Budget**

The New York State Educational Conference Board – comprised of the seven leading educational organizations representing parents, classroom teachers, school-related professionals, school business officials, building administrators, superintendents, and school boards – has determined that \$1.2 billion in additional school aid will be needed simply to maintain current operations. This assessment is based on projected increases in such areas as salaries (3%), health insurance (5.7%) and the Consumer Price Index (2.2%). These forecasts correlate with regional assumptions including an anticipated health insurance increase of 7%. Expected reductions in pension funding after several years of spikes should provide some reprieve but not enough to offset other cost drivers. The remaining \$800,000 of the \$2 billion request would be allocated for costs associated with several state initiatives to raise student achievement including common core, APPR, and Data Driven Instruction. **These reforms have been instituted in a time of dwindling resources thus taxing the capacity of schools to carry out its mission. With economic prospects brightening, it is now time that the state restore adequate funding to schools so it can meet the rising standards.**

Governor Cuomo has been championing the concept of allocating portions of school aid based on a competitive basis. Examples include pre-kindergarten, extending the school day, creating community schools, and rewarding high-performing teachers in high-need districts. Though this would be more meritorious in a truly equitable environment, the fact is that **many schools either do not qualify for some of the grants or do not have the capacity to apply and/or sustain them.** Such grants are often resource intensive to produce and implement at a time when schools are focusing on a myriad of other initiatives with less capacity than they had seven years ago. Unsurprisingly, the interest in these grants statewide has been disappointing. Such monies would therefore be better allocated as direct operating aid for districts to assist them in regaining what has been lost in recent years.

Relatedly, the state has a projected surplus of over \$4.2 billion in fiscal year 2014-15. While, we may agree that these short term funds should not be used in allocation for long term responsibilities, there are places where they could be best served in the area of education. One suggestion would be to reimburse schools for prior year claims, some of

which go back to 2009. Reportedly, the state owes school districts \$253 million in prior year aid claims, which have been deemed valid by the State Education Department. At PCS, the state owes the District \$284,000 in this category. Such monies would be particularly helpful in purchasing materials to implement the common core curriculum or providing training to our faculty and staff. **We request that the state meet its current funding obligations before searching for new projects for investment.**

### **Create a Non-Political Commission to Develop an Equitable State Aid Funding Formula**

In 2007, the state began a process of increasing aid to education based on a new funding formula in response to a successful lawsuit filed by the Campaign for Fiscal Equity. This legal action satisfied a 13 year battle including a response by the Court of Appeals to urge the state to provide its constitutional guarantee of a sound, basic education to our students. However, after two years of an expected four year phase in of funding, the state unilaterally halted its obligations in the CFE case and froze the Foundation Aid Formula. Since that time, an analysis of the new funding formula indicates continued inequities which is particularly exacerbated by the state legislature's practice of ensuring that different regions of the state receive a certain percentage of "shares" regardless of need. This has resulted in some schools being under or over funded. According to the Statewide School Finance Consortium, **in 2014-15 the Potsdam Central School District received \$772,483 less than it should have under the Foundation Aid Formula.** This is very concerning particularly when coupled with the losses under the GEA.

Though New York State ranks high among other states in regard to overall educational financing, its equitable distribution of those funds places it among the lowest in the nation. In a recent study provided by Dr. Bruce Baker, of Rutgers University, it was determined that **NYS ranked 44<sup>th</sup> of 50 states in the equitable distribution of school funding.** This is due to the highly politicized nature of school aid distribution where each legislator works to obtain a certain share of funding regardless of need. As a result, some schools have barely realized the state fiscal crisis and continue to provide similar or enhanced programs for students while others have been forced to the brink of educational and fiscal bankruptcy.

**To remedy these funding inequities and to ensure all students receive a constitutionally guaranteed sound basic education, we call on the state to accept the NYS Rural Schools Association recommendation to establish a non-political School Funding Equity Commission.** This commission should follow the model used by New York State when it established the Berger Commission to resolve the politically sensitive issue of hospital closure and repurposing. Specifically, we request:

1. Education funding allocation decisions be de-coupled from the legislature by empowering a team of nationally recognized school finance experts to design a new school finance system that is research based and fair to all New York students and school districts,
2. That this team of nationally recognized school finance experts be charged to operate independently of political influence, and design a system for allocating school funds that is equitable, predictable, sufficient, transparent and readily comprehensible by New York residents,
3. That the recommendation of this School Funding Equity Commission become law at a date certain unless that recommendation were to be specifically turned down by a vote of both houses of the legislature,

4. That the School Funding Equity Commission be charged to develop a plan with a three year phase-in to cushion districts from any dislocation a new funding system might impose, and
5. That after six years (three year phase-in and three years operation) a similar Commission be charged to review the impact of the new funding approach and make recommendations for improvements.

### **Make Health Insurance More Affordable to School Districts**

One of the largest and fastest rising costs to school districts is health insurance. This rate climb is expected to continue in 2015 as exemplified by the NYS Department of Financial Services' announcement in September **that New York's health insurance rates for 2015, including rates for the health benefits exchange will increase by 5.7%. This rate is expected to be even higher in the North Country as Potsdam along with other regional districts are facing expected premium rate increases of 7% in 2015-16.** This will mark the fourth year in a row in which health insurance costs rose 7% or higher in this area. Due to such increases, our districts are now spending approximately 20 cents of every dollar on this benefit.

This critical issue is not inherent to Potsdam as school districts across the state have dealt with similar problems in recent years. **Therefore, rather than continue to have hundreds of schools try to resolve a statewide problem individually, the state legislature should be developing solutions which can be implemented for the benefit of all. One suggestion would be to explore the development of a single statewide health plan which would cover all public school employees. There is potential strength in having one large pool which will have more power to bargain rates with health care providers.** It would also allow plan changes to be made universally to lower costs rather than having to bargain them with labor groups in each district.

### **What Can You Do To Help?**

#### **1. Develop and Test Your Laser Talk**

We believe that powerful speaking is the key to being an effective advocate for our schools. Advocates speak powerfully by telling gripping stories, and by giving brief presentations that we call "laser talks".

Let's say you have the chance to speak with a member of our state legislature delegation at a town hall meeting, connect with a busy editorial writer on the telephone, or catch the attention of a friend. Typically, you will only have one or two minutes to get your point across. By using the "laser talk" format, you'll make the most of your opportunity.

Each laser talk has three sections. In the first section, you present a problem you want them to know about. Then you inform them about a solution to the problem. And finally, you call them to action.

**P** stands for **Problem**

**S** is for **Solution**, and

**A** stands for call to **Action**

Let's look at each section in more detail. The first section, identify a problem you want your listener to know about. Try to connect the problem to an issue the listener already cares about. For example, if you are speaking with our Assemblywoman, you might let her know you are scared about the type of school district that will remain after we make deep cuts. You might say,

*"I appreciate the support you have always given our school district, but I am terrified of what will happen if the Gap Elimination Adjustment remains the same. I understand our Board of Education might be forced to make further cuts to athletics and extracurricular activities; eliminate Pre-Kindergarten and Kindergarten; make further reductions to the arts; and eliminate AP courses and the kinds of high school electives that help keep students engaged in school, so they can graduate career and college-ready. In addition, we will likely see our elementary class sizes soar to 30 or more. And even those cuts will not close our budget gap."*

Next, inform the listener about a solution to the problem you just presented. Give examples of how the solution would work and why it would be effective. You might cite a recent study, or use other credible statistics. Here's an example:

*"Our district is currently losing \$970 per pupil in school aid under the GEA, while the state average is less than \$400. The Foundation Aid Formula also shortchanges the district by approximately \$800,000. In fact we are receiving less aid now than in 2008-09 despite rising costs and additional unfunded or underfunded mandates. Enough is enough. The time has come to end the GEA and create a bipartisan commission to create a more equitable funding formula for our public schools."*

The final section of the laser talk is the Call to Action. Calls to action should be concrete, specific, and formed as a Yes/No question. An example is the following request you might make of our State Senator:

*"A number of state organizations have called for a state budget which allocates \$2 billion to bring our schools back to full funding and provide the capacity to meet state initiatives to raise student achievement. Would you support legislation to make such remedies a reality?"*

Before you give a laser talk, it's a good idea to practice it. Say it out loud to yourself, and then to another person until you feel comfortable with it. Soon you'll be able to make the talk your own, using different sections as you need them, and adapting them to different situations. Learning a good repertoire of laser talks to use when the time is right will help make you a powerful advocate.

We also recognize the value of compelling stories. Good storytelling captivates all of us. As we listen to a good story, our common humanity is touched, and we have the potential to be changed.

For instance, consider the following passage:

*"I grew up and attended high school on Long Island. My school district had a planetarium with a full time planetarium director, offered six different languages at the high school level, and provided more than one hundred elective classes to its high school students. Students I graduated with attended Ivy League colleges. Today, one writes for The New York Times, one served four terms in Congress, and one is the most decorated cabaret star in New York City. Quite frankly, I had opportunities that my children will never have here. Yet, the students in our school compete with the students from my high school for the same slots in college. We can't allow the opportunity gap to grow even wider. The economic health of Upstate New York is dependent on this."*

*"When we moved to Potsdam, we were impressed by the vast array of courses available to our students. Though this is a relatively small rural district, our older children had the opportunity to study Latin and to explore engaging courses in Business, Family and Consumer Science, Agriculture, and many more. Our youngest child only has a fraction of the opportunities available to him, and I really worry about him losing interest in school and not being able to effectively compete for slots at college or university."*

Stories take something that's abstract and impersonal, like a statistic, and turn it into something very intimate and emotional. A good story softens the listener and appeals to their humanity in a way that facts alone cannot.

We use compelling stories to illustrate both the problems with inequitable school aid and solutions to remedy them. Stories can be memorized, like we do with laser talks. Or, if they're longer, we can read them to our audience. Either way, it's important to present stories in a natural style so their power shines through.

We are convinced that sharp laser talks and compelling stories about real people can change hearts and minds, and ultimately, help bring about changes we need in Albany.

## 2. Write a Letter to Our Assemblywoman, Senator, and Governor

It's your right to communicate your opinions and knowledge to the people who have been elected to represent you in our state government. These people rely on their constituents to inform them of issues affecting their communities. They want to know what is important to you, and they value your input. Our elected officials often report that they do not hear much from those represented on many issues. Your advocacy is not just permissible, it's appreciated.

You already know the issues that our school is facing, and you have practiced your main talking points. Now, it's time to communicate the message in writing.

Some forms of written communication are more impactful than others. While e-mails and form letters are fine, personal letters (perhaps even hand written) convey a stronger message. It shows you went out of your way to make known your concerns.

Writing a letter and making a follow-up phone call only takes a few minutes of your time, but it ensures that your representatives know how you want to be represented. When writing a letter, you should include the same points that you refined in your laser talk, including a *statement of the problem*, a *proposed solution*, and the *call to action*. It is best to keep the letters short. Our elected officials are busy people, and a letter that gets right to the point is more likely to be remembered.

Letters to your elected officials should include the following parts:

### **Introduction**

*Example:*

As a constituent and a parent/student/tax payer/community member/business owner, I am writing to request your support for our school district in these trying financial times. I am asking you to support the elimination of the state's Gap Elimination Adjustment (GEA) which is creating an unsustainable financial burden for local public schools.

### **Statement of Problem**

*Example:*

Since 2010-2011, Potsdam Central School District has lost more than \$9.5 million in state aid as a result of the GEA. In fact, our school receives 4.5% less state aid today than six years ago. The district has applied a significant portion of its fund balance and reserves to offset this loss. Reserves are finite resources and cannot be counted on year after year to make up for the loss in state aid. Even with the use of fund balance and reserves, our district has lost nearly 50 instructional and support positions and dozens of educational programs and opportunities.

### **Proposed Solution**

*Example:*

I urge you to seek the elimination of the GEA. The Potsdam community needs your help now to make sure that schools get the funding they need to provide the best education possible for our students.

### **Call to Action**

*Example:*

Can I count on you to please speak with your fellow legislators and take the steps necessary to ensure the GEA is no longer allowed to undercut quality education in New York?

**Conclusion, Signature, and Contact Information**

*Example:*

Thank you for considering my concerns. I look forward to talking with you on this issue.

Sincerely,

Name, home address, phone number, cell phone number, email address

**The following are the public officials who represent our interests in Albany:**

<p><b><u>Governor Andrew M. Cuomo</u></b>  New York State Capitol Building  Albany, New York 12224  Phone: (518) 474-8390  Fax: (518) 474-1513</p>	
<p style="text-align: center;"><b><u>Assemblywoman Addie J. Russell</u></b></p> <p style="text-align: center;"><b>District Office</b>  Jefferson County District Office  Dulles State Office Building  Suite 210 317 Washington Street  Watertown, NY 13601  Phone: 315-786-0284  Fax: 315-786-0287</p> <p style="text-align: center;"><b>Albany Office</b>  Legislative Office Building 456  Albany, NY 12248  518-455-5545</p> <p>Email: <a href="mailto:RussellA@assembly.state.ny.us">RussellA@assembly.state.ny.us</a></p>	<p style="text-align: center;"><b><u>Senator Joseph A. Griffo</u></b></p> <p style="text-align: center;"><b>District Office</b>  207 Genesee Street Room 408  Utica, NY 13501  United States  Phone: (315) 793-9072  Fax: (315) 793-0298</p> <p style="text-align: center;"><b>Albany Office</b>  188 State Street Room 612  Legislative Office Building  Albany, NY 12247  Phone: (518) 455-3334  Fax: (518) 426-6921</p> <p>Email: <a href="mailto:griffo@nysenate.gov">griffo@nysenate.gov</a></p>

**SAMPLE LETTER**

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Date \_\_\_\_\_

Assemblywoman/Senator \_\_\_\_\_

Legislative Office Building \_\_\_\_\_

Albany, NY 12248

Dear Assemblywoman/Senator \_\_\_\_\_:

As a constituent and a parent/student/tax payer/community member/business owner, I am writing to request your support for our school district in these trying financial times. I am asking you to support the elimination of the state’s Gap Elimination Adjustment (GEA) which is creating an unsustainable financial burden for local public schools.

Since 2010-2011, Potsdam Central School District has lost more than \$9.5 million in state aid as a result of the GEA. In fact, our school receives 4.5% less state aid today than six years ago. The district has applied a significant portion of its fund balance and reserves to offset this loss. Reserves are finite resources and cannot be counted on year after year to make up for the loss in state aid. Even with the use of fund balance and reserves, our district has lost nearly 50 instructional and support positions and dozens of educational programs and opportunities.

At a time when our children are expected to achieve at higher levels than ever before, we cannot afford to dismantle our quality program. My child deserves more than just a bare-bones education; s/he deserves rich and varied educational opportunities that will help her/him succeed and compete in a global economy. Without relief from state leaders, s/he may not get that chance. If the GEA continues, even more opportunities for \_\_\_\_\_ will be lost.

I urge you to seek the elimination of the GEA. The Potsdam community and its students need your help now to make sure that our school receives the funding to provide the best education possible.

Can I count on you to please speak with your fellow legislators and take the steps necessary to ensure the GEA is no longer allowed to undercut quality education in New York?

Thank you for considering my concerns. I look forward to talking with you on this issue.

Sincerely,

(Insert your name, home address, phone number, cell phone number, email address)

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### **3. Develop a Relationship with the Aides in Our Assemblywoman and Senator's Office**

People are surprised to learn that the often young aides in our elected officials' offices have so much influence on them. Indeed, all elected officials rely heavily upon the advice and counsel of their staff members. Their aides work tirelessly to collect and filter the large amounts of information and requests that bombard their offices. Good advocates know and understand this and work to build great relationships with these staff members.

Here are some suggestions for building and maintaining strong relationships with the staff members in your Assemblyman's and Senator's office:

- A. Learn about our Assemblywoman and Senator. It is easy to be intimidated by those who serve in elected office, but remember they are real people too. A Google search of them will tell you a lot about them. Learn their passions, interests, background, and aspirations. Doing so will allow you to converse more easily with them and their aides. It may also reduce your apprehension in reaching out to them.
- B. Call or visit your representative's local office. Your first conversation might sound like the following:
  - Introduce yourself.
  - Ask if the aid has a few minutes to speak with you.
  - Let them know you are a resident of the school district and a constituent of the Senator or Assemblywoman, and let them know you are concerned about the impact of the state budget on our schools.
  - Thank the aide for the work they do for the Assemblywoman or Senator, and let them know you hope what you have to share with them will be helpful in assisting them to better represent his/her district.

- Deliver your laser talk.
  - Ask if you can send additional information.
  - Let them know you will check back in a week to see how the elected official responded.
  - Thank them for their time.
- C. Send a quick thank you note to the staff member letting them know you appreciated the time they took to listen to your concerns. This can be a card, note or e-mail. Again, remind them you will check back with them in a week.
- D. If when you check back they tell you the Senator or Assemblywoman will help, be sure to use good positive reinforcement. A little bit of chocolate, some homemade cookies, or even a nice thank you note will go a long way! They will remember your appreciation the next time you call them.

**Get the attention of a good aide, and you've got the ear of the Senator or Assemblyman.**

#### **4. Meet with Our Assemblywoman or Senator**

If at all possible, meet with your Assemblyman or Senator. Each week during the budget season Albany has a "Tin Cup Tuesday." That is the day our elected officials set aside in the Albany offices for lobbying groups and interested taxpayers to make their case. Here are the easy steps to an effective visit to Albany:

- Schedule a meeting
  - Prepare for the meeting
  - Participate in the meeting
  - Follow up.
- A. Schedule a Meeting
- Plan what you are going to say when you call the Albany Office. Having a script or outline is always helpful and will make you feel more comfortable. Here is an example of a possible script:

Hello, my name is \_\_\_\_\_.

I am a (parent, resident, teacher, etc.) in the Potsdam Central School District.

I would like to meet with Senator/Assemblywoman \_\_\_\_\_ to discuss the distribution of school aid or mandate relief or.....

Is there a time that we might be able to meet? Or, I plan to be in Albany on \_\_\_\_\_, would it be possible to meet sometime that day?

- Call your Assemblywoman or Senator's office. The phone numbers are included in this tool kit.
- Ask to speak with the person who manages the calendar. If that person is unavailable or tells you they will have to get back to you, call back the next day. **Keep calling until you get your meeting scheduled**
- When you speak to the person who handles the Assemblywoman's or Senator's calendar, ask to have a face-to-face meeting with your elected representative. Follow the bulleted information contained in section number ONE (1) above.
- Thank the staff member for scheduling the meeting and let him or her know you will confirm the meeting by phone a few days prior to the meeting. Congratulations! Sometimes getting the meeting is the hardest part of the process.

## B. Prepare for the Meeting

Prior to the meeting, there are several things you can do to ensure that your meeting goes smoothly:

- A few days prior to your trip to Albany, you should call the office to confirm your meeting.
- Create an agenda for the meeting. Regardless of whether you are going alone or with a group, you should plan out what is going to be said, by whom, and in what order. The agenda is just for you and your team, if others are going with you. It is not to be distributed to the office staff or left with the representative. Remember, this is **your** meeting. You want to control it and be sure that your messages are conveyed.

Your meeting should generally follow this format:

### Introductions and Acknowledgements

- ✓ Each participant says who they are and what they do in the community (parent, resident, student, teacher, etc.)
- ✓ Acknowledge the public service of the representative and past actions on behalf of our school district.
- ✓ Let them know why you are in Albany and the issue you plan to discuss.

### Laser Talk

- ✓ State the **Problem**
- ✓ Provide the **Solution**
- ✓ Call for **Action**

### Closing

- ✓ Answer any questions
- ✓ Set a specific timeline for follow up
- ✓ Provide any "leave-behind" material
- ✓ Thank them for his/her time

If you are with a group of people, assign roles for the meeting. Choose a secretary and meeting manager.

- The secretary takes notes during the meeting and records any questions, objections, promises or concerns expressed by the elected official during the meeting. The secretary is also responsible for following up with a thank you note after the meeting.
- The meeting manager facilitates the conversation, provides the opening and closing statements, and works to keep the conversation on task and focused.

If you are meeting alone, you obviously have to play both roles. If so, inspire yourself. Know that you may be making an incredible difference in the lives of children by holding this meeting.

## C. The Meeting

Here are a few points to consider as you prepare to meet with our Assemblywoman or Senator, or their aide:

- Try to arrive a little bit early. The Legislative Office Building is quite large and it can be difficult to find your way if you are not familiar with it. Leave yourself enough time to find parking, go through security, and find your way to the office.
- Be concise. These folks will be working on a very tight schedule. You want them to remember every word you say. Stick to your message. If you have not been told how long the meeting will be, you can assume they have allocated 15 minutes for you. And, don't be surprised if your representative is late or can't attend due to pressing business in Albany. If so, meet with his or her aide and convey the same message.

- The offices are often small and crowded during visitation days. Be prepared to have to stand while waiting.
- Try your best to connect on a human level. A bit of humor goes a long way. Remember, on these days of visitation, everyone is making demands. Niceness goes a long way.
- Be passionate, not emotional. Emotional pleas make others in the room uncomfortable.
- Be prepared to summarize arguments to the issue. Be sure you understand their opposition, and have talking points prepared to combat them.
- Make the issue personal. Speak of children....your children, if applicable.
- Say "thank you." Surprisingly, our elected officials hear "thank you" less often than you would imagine. Be sure to thank the staff when leaving the office, too.

#### D. Following Up

After the meeting, follow up with the person with whom you met. Your actions after the meeting demonstrate the importance of the topic to you and can keep the legislator's attention focused on the issue. It would be good to send a note or e-mail after the visitation that reiterates your points, and your call to action.