

## I. Introduction<sup>1</sup>

Throughout the country, states use various methods and mechanisms to fund their public schools and attempt to account for student needs. In this policy briefing we examine how Connecticut's peer states fund their public schools and how they account for the larger costs associated with educating students with greater learning needs, such as low-income students and English Language Learners (ELLs).

State funding formulas generally fall within one of two categories: weighted or input-based. Weighted-student formulas assign a number to the cost of educating an average student (commonly known as the foundation or base cost) and then use weights to determine costs of educating needier students, or students in special programs. These weighted costs are then added to the foundation to determine funding for higher-need students. States then count the number of total students enrolled, as well as the number of students falling within each weighted category (with some nuances), and set the amount of required funding for each district accordingly.

Input-based formulas, on the other hand, assign a per-pupil cost figure to each needed resource, which can include everything from supplies to computers to teachers. States then multiply each district's total student enrollment by those resource costs to set its amount of required funding. (Input-based formulas are generally not sensitive to student needs.) A few states, including Maine and Massachusetts, use hybrid formulas that assign weights to students with special needs and also identify the costs of individual inputs.

In most cases, states using either type of funding system will have a formula specifying a required minimum contribution from the locality. This amount is then deducted from the total amount of funding the state has determined is necessary for the district, and the balance is the amount of state aid the district will receive.

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## Connecticut's Regional Peers

This report focuses on Connecticut's regional peers: the other New England states (Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont), as well as three nearby mid-eastern states (New Jersey, New York, and Maryland). Pennsylvania was originally intended for inclusion as well but was ultimately excluded because its state funding system is currently in flux. All of these states employ a weighted-student formula or a hybrid formula; none uses a primarily input-based formula. All adjust their district funding allocations in some way to provide additional resources for the education of low-income students and students with disabilities, and nearly all do so for ELLs. However, the details of these adjustments, as well as other considerations that impact the allocation of state education funding, vary significantly from state to state.

### ***A Note on Maine and Massachusetts***

Unlike the other six states, which use traditional weighted-student formulas and have a set per-pupil foundation amount that is then weighted and adjusted for student characteristics, Maine and Massachusetts use hybrid formulas that do not have single, statewide foundation amounts but do take into account some line-item input costs.

In Maine, student/teacher ratios are prescribed for each grade band (PK-5, 6-8, and 9-12), and teachers are paid according to a "step-and-lane system" based on training and experience. There are also set ratios and salaries for other school staff members, along with associated amounts for benefits. Once all staff costs for a district have been calculated based on its enrollment, line-item costs are added for other inputs, including supplies, support services, and maintenance. The resulting cost is adjusted for the regional cost of living. This total number is then divided by the number of pupils in the district to provide a district-specific foundation amount. Only then are weights and adjustments, such as the state's weight of 1.15 for low-income students, applied. For 2015-2016, base amounts range from \$5,238 to \$7,649 per student.

In Massachusetts, instead of weighting an overall foundation amount based on the number of needy students, the formula weights the costs of individual resources. Therefore, the per-pupil costs associated with teachers, benefits, materials, professional development, etc. are not constant from pupil to pupil;

each input has a different cost for every category of pupils. Categories of students defined for this purpose include but are not limited to: regular or Special Education elementary; regular or Special Education high school; limited English 1-12; and vocational education 9-12. Districts are funded for the line-item costs associated with the makeup of their particular student bodies. Above and beyond these allocations, districts also receive flat amounts (rather than weighted amounts) for students in other categories, such as low-income students and students in certain types of Special Education placements.

## II. Weighting and Adjustments for Low-Income Students

All eight of Connecticut's regional peers adjust their per-pupil allocations for low-income students. Six (Maryland, New Jersey, New York, Maine, Rhode Island, and Vermont) do so by weighting their per-pupil foundation amounts to provide districts with more per-pupil funding for the number of low-income students they serve. New Hampshire provides districts with an additional flat amount for each low-income student. Massachusetts provides districts with one flat amount for each low-income elementary school student (grades 1-8) and a different, smaller flat amount for each low-income high school student.

### How Low-Income Students are Counted

All eight states use districts' free and reduced-price lunch (FRPL) eligibility counts in their calculation of funding for low-income students. Five (Maryland, New Jersey,<sup>2</sup> Maine, New Hampshire, and Rhode Island) use only FRPL. In these states, the number of students eligible for FRPL in a district is the number of students considered low-income for the purposes of state education funding. This was also the case in Massachusetts in 2014-15, the year represented by the data in the Appendix; however, the policy in Massachusetts is currently in transition, and

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<sup>2</sup> Technically, New Jersey's weight applies to students whose household incomes fall at or below 185 percent of the federal poverty level. This is the same eligibility standard used for reduced-price lunch, making the two student counts equivalent, but the language in the statute is not dependent on the lunch program standard.

the state will move to a system of counting low-income students based on their participation in other social safety net programs by 2016-17.<sup>3</sup>

Vermont also defines a low-income student as one who is eligible for FRPL. However, Vermont also includes ELLs whose families are not low-income in its count of the low-income students in each district. Its low-income weight therefore applies to all low-income students, including low-income ELL students, as well as ELL students whose families are not low-income. Because Vermont also has a separate weight for ELL students (see Section III below), all ELL students in Vermont are automatically weighted for both student poverty and ELL status. Low-income ELL students are also not weighted at a higher level than non-low-income ELL students.

New York uses a combination of FRPL eligibility and census poverty figures to determine its “poverty count.” In brief, the count of students in poverty reflects the sum of 65 percent of FRPL-eligible students and 65 percent of students falling below the federal poverty line.<sup>4</sup> This is the number of students that are weighted

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<sup>3</sup> In response to the federal school lunch program's introduction of the Community Eligibility Provision (CEP), which will allow many schools and districts to receive free meals for all of their students without having to collect student-level data, Massachusetts plans to move to a system for counting low-income students that does not rely on the availability of this data. Its new system will count as “economically disadvantaged” all students participating in one or more of the following state-administered programs: the Supplemental Nutrition Assistance Program (SNAP); the Transitional Assistance for Families with Dependent Children (TAFDC); the Department of Children and Families' (DCF) foster care program; and MassHealth (Medicaid).

In 2014-15, the old system of relying exclusively on FRPL data was used. However, 2015-16 is a transition year so FRPL data will be used for districts not making use of the CEP, and a combination of FRPL data and the new program participation data will be used for CEP districts. The intention is to use only program participation data beginning in 2016-17. Because fewer students will be counted as economically disadvantaged under the new system than were classified as FRPL-eligible under the old, the Massachusetts Department of Elementary and Secondary Education has recommended to the state's Foundation Budget Review Commission that the formula's supplemental funding amounts for low-income students be increased sufficiently to offset the drop.

<sup>4</sup> Specifically, New York takes the three-year average percentage of K-6 students eligible for FRPL and multiplies that by the entire K-12 enrollment to create its “lunch count.” This method seems to be based on an assumption that K-6 FRPL figures are more accurate reflections of student need than 7-12 figures. It also

for poverty as part of the state's Pupil Need Index (PNI), which considers not only poverty but also ELL status and sparsity. When isolated, the poverty portion of the PNI is equivalent to the weight listed in the Appendix.

### III. Weighting and Adjustments for Low-Wealth Districts

In addition to funding districts for individual low-income students, some states allocate additional aid for districts with little property wealth or high concentrations of low-income students. California, for instance, provides a "concentration grant" to districts whose populations of needy students exceed 55 percent of enrollment. None of Connecticut's eight regional peers has such a discrete weight or allocation meant specifically to support districts with high concentrations of low-income students. This does not mean, however, that none of these states consider community poverty in their formulas. While none of the New England states do so, New Jersey, New York, and Maryland factor district poverty into some allocations.

New Jersey has some sensitivity to districts' poverty densities built into its weight for FRPL-eligible students. As noted in the Appendix, this weight exists on a sliding scale. In districts where fewer than 20 percent of students are FRPL-eligible, the weight is 1.47, while in districts where 60 percent or more are eligible, the weight is 1.57. For districts where between 20 percent and 60 percent of students are FRPL-eligible, a formula produces a weight between 1.47 and 1.57.<sup>5</sup>

New York's formula calculates a "Combined Wealth Ratio" for each district that modifies several other allocations, including Vocational Aid, Computer Administration Aid, Academic Improvement Aid, and Public High Cost/Excess Cost Aid (a Special Education-related allocation). The Combined Wealth Ratio is a complex measure of a district's wealth that takes into account both local property values and the income of residents of the district.

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takes the percentage of children aged 5-17 enrolled in the public school district that fall below the poverty line, as tabulated by the National Center for Education Statistics (NCES) based on census data, and multiplies that by the entire K-12 enrollment to create its "census count." It then multiplies each of these two counts by .65 and adds the resulting products together to create the "poverty count."

<sup>5</sup> In such districts, the formula is:  $\text{Weight} = (1 + ((\text{FRPL-eligible percentage} - 2) \times .25) + .47)$ .

Maryland does not aid low-income districts automatically. However, it does provide funding to incentivize low-income districts to raise more local funding. For counties that have less than 80 percent of the statewide average wealth per pupil, and raise more local funds than required, the state provides some matching funds through its Guaranteed Tax Base program.<sup>6</sup>

New Hampshire, like the rest of the New England states, does not currently have a funding provision that expressly supports low-income districts. From 2008 to 2011, however, New Hampshire had Fiscal Capacity Disparity Aid, an allocation specifically intended for property-poor districts and districts with below-average median household incomes. When this aid was eliminated in 2011, the state provided stabilization grants to make up the difference temporarily, holding districts harmless at 2011 levels for two years and then beginning to reduce the stabilization grant over time. The state therefore continues to provide some decreasing support to districts based on 2011 calculations of neediness.

#### **IV. Weighting and Adjustments for ELL Students**

Of Connecticut's eight regional peers, seven – all except Rhode Island – adjust their per-pupil funding allocations for ELLs. Five (Maryland, New Jersey, New York, Maine, and Vermont) do so by weighting their per-pupil foundation amounts to provide districts with more per-pupil funding for the number of ELL students they serve. (New York's weight is one element of its Pupil Need Index; when isolated, the ELL portion of the PNI is equivalent to the weight listed in the Appendix.) Massachusetts provides districts with a higher level of per-pupil funding for most individual inputs for each enrolled ELL student. New Hampshire provides districts with an additional flat amount for each ELL student.

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<sup>6</sup> In such districts, the formula for the Guaranteed Tax Base program is: Allocation= (district's above-requirement local effort x (80% of statewide average wealth per pupil – district's local wealth per pupil) x local enrollment).

## Weights and Funding Levels

### How Low-Income Students are Funded

The following table summarizes the weights and dollar amounts these states employ for providing additional funding support to districts serving low-income students. All numbers are for the 2014-15 school year, except those for Maine and New Hampshire, which are for the 2015-16 school year.

State	Foundation Amt.	Low-Income Weight	Low Income Non-Weight Adjustment	Total Effective Funding Per Low-Income Student (No Other Special Needs)	Notes
CT	\$11,525	1.3		\$14,982.50	Connecticut stopped using the Education Cost Sharing formula to fund schools in 2013.
MD	\$6,860	1.97		\$13,514.20	
NJ	\$11,009	1.47-1.57		\$16,183.23 - \$17,284.13	The weight increases along with the concentration of low-income students in a district. In districts with a low-income concentration lower than 20%, the weight is 1.47. This gradually increases to a maximum weight of 1.57 for districts with a concentration that is $\geq 60\%$ . See Section III for further details.
NY	\$6,451	2		\$12,902	Determined by separating the Pupil Need Index into component parts (see Section II).
ME	Varies by district	1.15		\$6,023.70 - \$8,796.35	Encompasses the effect of the weight on the full range of district base amounts.
MA	N/A		\$3,422 (grades 1-8) \$2,767	\$10,744.68 (elementary) \$10,364.38 (middle/junior)	Massachusetts does not have true foundation amounts, but the total per-pupil amount for a student

			(grades 9-12)	\$11,423.64 (high)	in each grade band with no other special classifications can be determined by dividing the total resource costs for those bands by the number of enrolled students in several example budget sheets. The effective number was determined by adding those amounts to the flat low-income support funds specified in the MA formula.
NH	\$3,561.27		\$1,780.63	\$5,341.90	
RI	\$8,966	1.4		\$12,552.40	
VT	\$9,285	1.25		\$11,606.25	See explanation in Section II regarding included students.

### How ELL Students are Funded

The following table summarizes the weights and dollar amounts these states employ for providing additional funding support to districts serving English language learners. All numbers are for the 2014-15 school year, except those for Maine and New Hampshire, which are for the 2015-16 school year.

State	Foundation Amt.	ELL Weight	ELL Non-Weight Adjustment	Total Effective Funding Per ELL Student (No Other Special Needs)	Notes
CT	\$11,525			\$11,525	Connecticut stopped using the Education Cost Sharing formula to fund schools in 2013.
MD	\$6,860	2		\$13,720	
NJ	\$11,009	1.5		\$16,513.50	Weight reduced to 1.25 when student is also classified as low-income.
NY	\$6,451	1.5		\$9,676.50	Determined by separating the Pupil Need Index into component parts (see Section II).



ME	Varies by district	1.5-1.7		\$7,857 - \$13,003.30	Weight varies depending on density of ELL students in district; effective funding figures reflect the full possible range, from smallest base weighted at lowest level to largest base weighted at highest level.
MA	N/A		Resource costs	\$9,166	Effective funding figure determined by dividing total resource costs for this student category by number of enrolled ELL students in several example budget sheets.
NH	\$3,561.27		\$697.77	\$4,259.04	
RI	\$8,966			\$8,966	No additional funding provided.
VT	\$9,285	1.2 (official)  1.45 (see note)		\$11,142 (official)  \$13,463.25 (see note)	Vermont counts ELL students whose families are <i>not</i> low-income as being low-income for the purposes of its student poverty weight, effectively adding an additional weight of .25 for those students (see Section II). This means that while the formal ELL weight in Vermont is 1.2, all ELL students ultimately receive a total ELL + Low-Income weight of 1.45, irrespective of whether they are low-income.

### Effective Funding Summary

The following table summarizes the total effective dollar amounts these states allocate for students in particular need categories, assuming no overlap in special needs. See the above tables for explanatory notes and further detail.

State	Year of Data Shown	Foundation Amt.	Low-Income Student Funding	ELL Student Funding
CT	2014-15	\$11,525	\$14,982.50	\$11,525
MD	2014-15	\$6,860	\$13,514.20	\$13,720
NJ	2014-15	\$11,009	\$16,183.23 - \$17,284.13	\$16,513.50
NY	2014-15	\$6,451	\$12,902	\$9,676.50
ME	2015-16	Varies by district	\$6,023.7 - \$8,796.35	\$7,857 - \$13,003.30

MA	2014-15	N/A	\$10,744.68 (elementary) \$10,364.38 (middle/junior) \$11,423.64 (high)	\$9,166
NH	2015-16	\$3,561.27	\$5,341.90	\$4,259.04
RI	2014-15	\$8,966	\$12,552.40	\$8,966
VT	2014-15	\$9,285	\$11,606.25	\$11,142 (official) \$13,463.25 (see note in table above)

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