

How Much Money Follows the Student in SBA Districts?

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Why are SBA models gaining traction in the U.S. ?

- Equity
- Transparency
- Flexibility in resource use, site based autonomy
- Accountability structures
- Student choice and funding portability
- Financial sustainability
- Service-oriented central departments



Hartford Public Schools SBA formula

SBA FORMULA

PRE SBA FORMULA

Base Allocation +
of Teachers
1 Principal
1 Assistant Principal
1 Secretary
of Guidance Counselors
of Custodians
of Secretary Guards
Materials & Supplies
Program Allocations
= Total Budget

Category	Weights	Amounts
Pre Kindergarten	0.96	\$ 6,000
Kindergarten	1.00	\$ 6,333
Grades 1-3	1.20	\$ 7,599
Grades 4-5	1.00	\$ 6,333
Grades 6-8	1.10	\$ 6,966
Grades 9-12	1.30	\$ 8,233
DRA (K-3 Below Proficient)	0.20	\$ 1,267
Achievement (4-12) CMT/DRP/CAPT (5-12 Below Proficient)	0.16	\$ 1,013
Gifted Talented	0.10	\$ 633
ELL 0-20 months	0.43	\$ 2,723
ELL 20-30 months	0.22	\$ 1,393
ELL 30+ months	0.11	\$ 697
Special Education Level 1	0.71	\$ 4,496
Special Education Level 2	1.16	\$ 7,282
Special Education Level 3	2.12	\$13,425
Special Education Level 4	3.60	\$22,797





Data and Methodology

- 10 large urban school districts (FY14/FY15 financial data)
- Evaluated Student Based Allocation formulas and removed non-student characteristic aspects
- Data retrieved from school district websites and district budget personnel
- Created new metric to capture what % of all district funds are allocated on a per-pupil basis



% SBA metric

Portion of district funds allocated on the basis of students or student types.

$$\frac{\$ \text{ allocated on the basis of students or student types}}{\$ \text{ total district spending less long-term obligations}} =$$

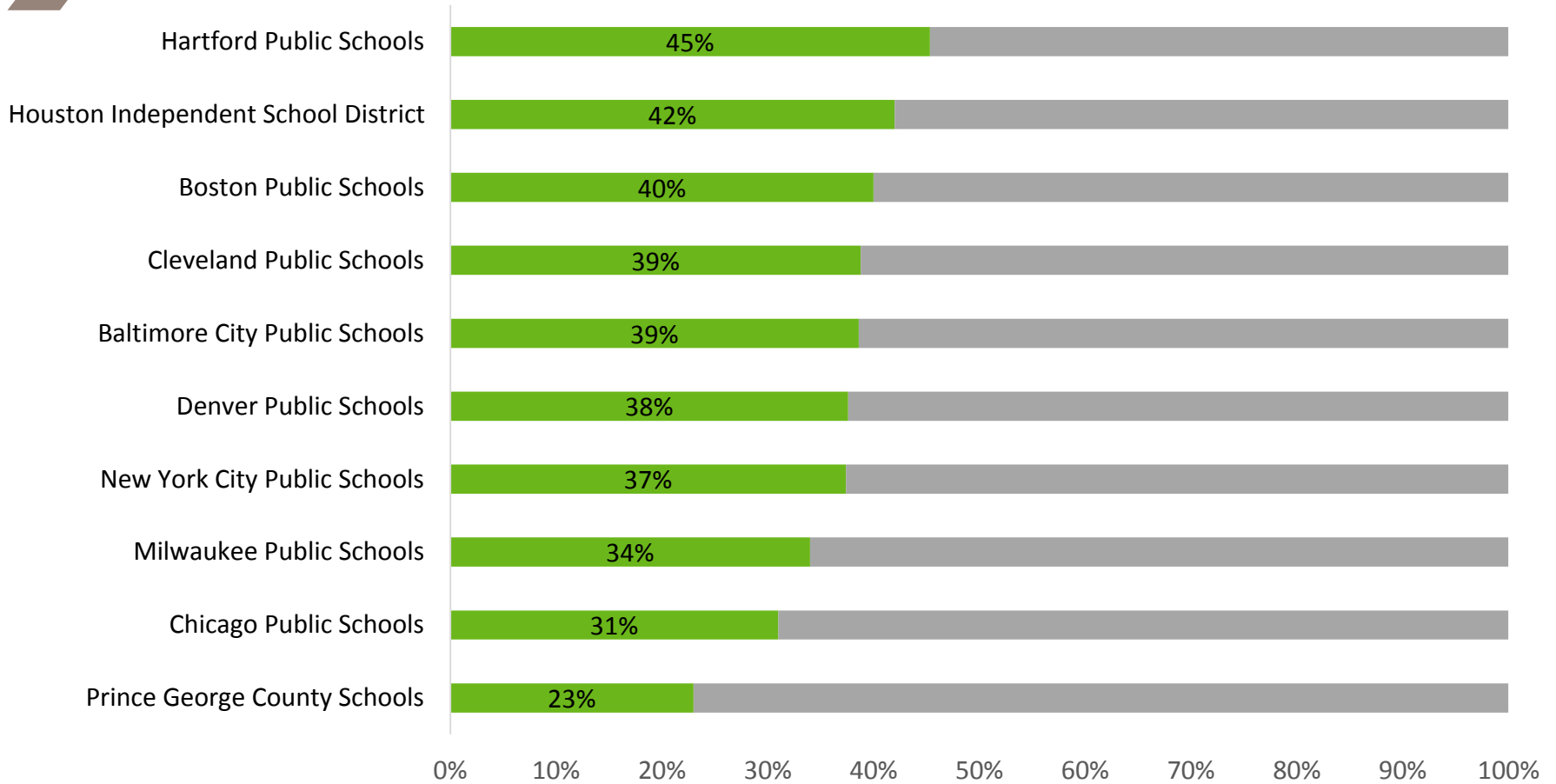
(debt, rainy day, capital)

=

% SBA



Districts formulas vary on % of total funds allocated via SBA



Note: %SBA is not the same as total funds allocated to schools



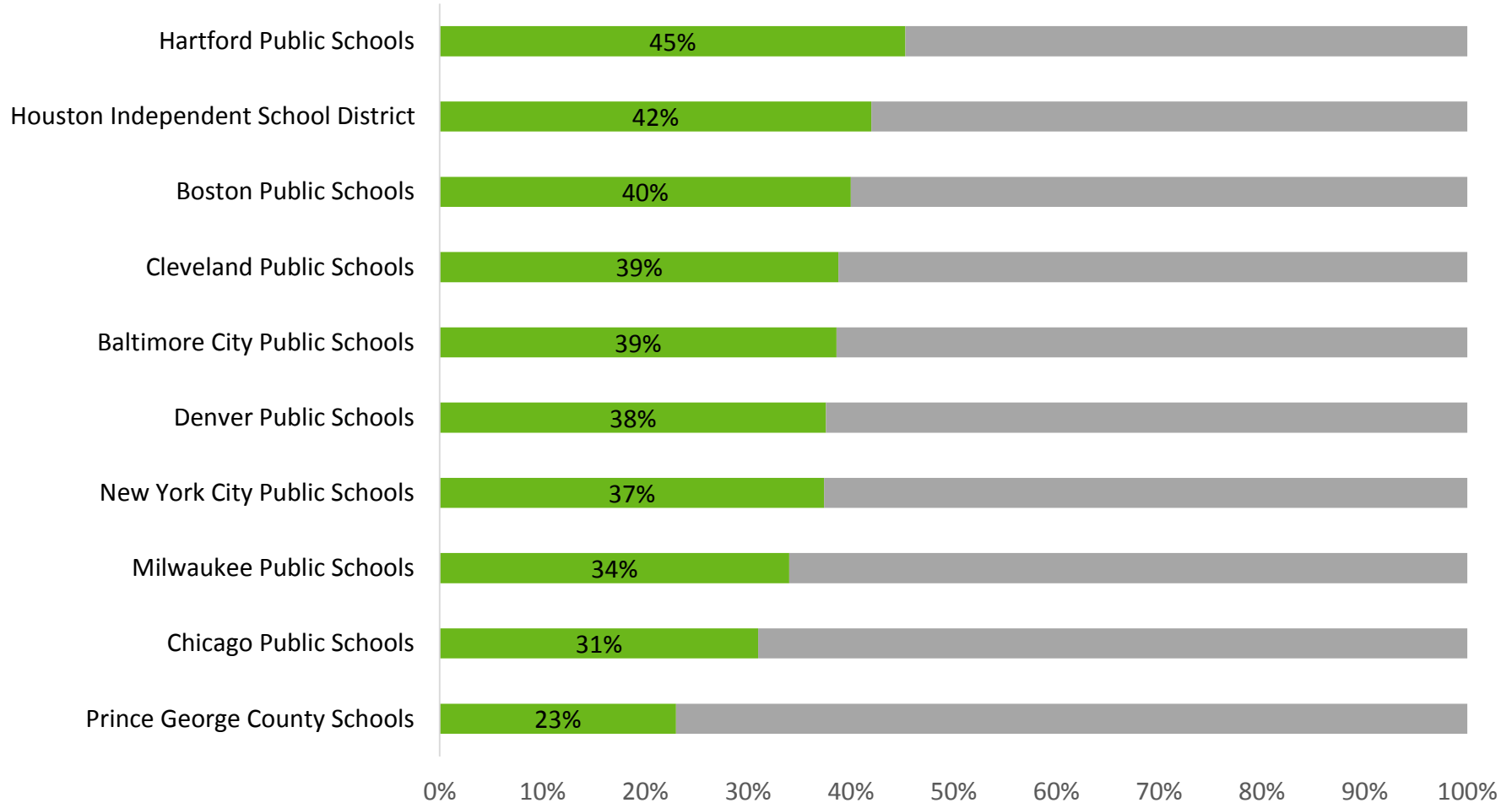


Some notes about the %SBA metric

- **Included**: Any funds deployed as a fixed dollar amount per student or per defined student type.
- It is **NOT** a measure of the portion of district funds spent at the school level, or spent directly on students. In fact, funds included as SBA could fund central services.
- Yes, state/federal law can get in the way of allocating some revenue streams via SBA.



Districts can use this measure to gauge progress over time



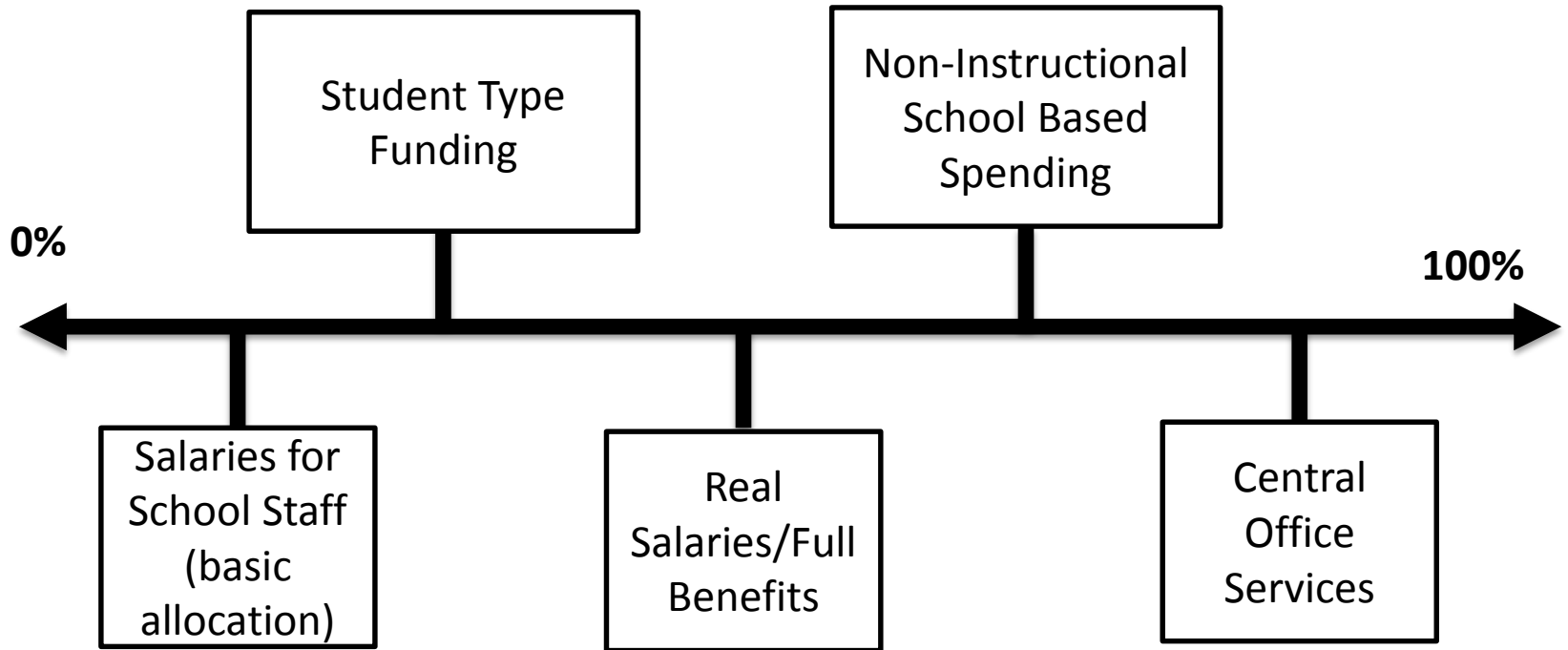


District Reaction to Findings

- Generally surprised at low percentages
- Conflated % SBA metric with % of funds that go directly to schools or % of funds spent on behalf of students
- Confusion around what constitutes a true student based allocation (New York and Baltimore SPED allocations)



District SBA Implementation Trajectory



THANK YOU

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Edunomics Lab is a university-based research center dedicated to exploring and modeling complex education fiscal decisions and growing the capacity of education leaders on the topic of education finance. The Edunomics Lab is affiliated with McCourt School of Public Policy at Georgetown University.

