



## Evaluating School Funding Formulas Checklist: What Questions Should Legislators Ask?

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This checklist raises important issues that can help legislators sort out how well legislative proposals meet the goals of education in Wisconsin; how compatible they are with Wisconsin's history of funding elementary and secondary schools; how responsive they are to the demographic characteristics of Wisconsin students, families, and communities; and how appropriate they are given the state's available resources. These questions are not rank-ordered and sometimes conflict with each other, forcing legislators to make trade-offs about which deserve the highest priority. Because these questions are not designed to lead to a particular policy solution, they can be useful to policymakers across the political spectrum. Unless otherwise noted, these questions derive primarily from the work of Augenblick, Van de Water and Myers.<sup>18</sup>

- 1. What does the proposal want the educational system to accomplish and what kind of educational opportunities must be provided for students to meet these objectives?<sup>2</sup>
- 2. Does the proposal invest in nonschool influences on student achievement such as early childhood education, summer school, out-of-school time, and parent involvement?<sup>3, 4</sup>
- 3. Does the proposal explicitly fund the formation of family/school/community partnerships which, according to recent national estimates, cost \$20 to \$30 per pupil per year for all school, district, and state expenses?<sup>5, 6</sup>
- 4. How sensitive is the proposal to the allocation of state aid to the needs of school districts (e.g., number of low-income families, concentration of disadvantaged students, number of students requiring special education, number of children needing instruction in English, transportation needs, enrollment levels, and school size)?
- 5. How sensitive is the proposal to the wealth of school districts (e.g., property tax base, nonproperty revenues, or income level of the district)?
- 6. Is state aid that is not sensitive to the wealth of the school district limited (e.g., incentive or hold harmless funds)?
- 7. How sensitive is the allocation of state aid to the tax rates of school districts (e.g., to avoid situations in which higher tax rates are associated with lower spending levels)?
- 8. Is the variation among school districts' spending explained primarily by differences in their local costs and tax effort?
- 9. Do school districts have a reasonable amount of flexibility to determine how much they want to spend, and to generate revenues at the levels they select?
- 10. Do school districts have reasonable flexibility to spend funds?
- 11. Are all types of expenditures considered by the school finance system (e.g., operation, capital/debt, and personnel benefits)?
- 12. Are taxpayers treated equitably (e.g., property is assessed uniformly, low income taxpayers are relieved of some of the obligation to pay property tax, and the burden of paying for schools is shared equitably among homeowners and businesses)?
- 13. Does the state define and measure equity and periodically assess how equitable the school finance system is?
- 14. Does the state define and measure adequacy and periodically determine whether adequate funding is being provided in all school districts?
- 15. Does the proposal include features that will position Wisconsin as a leader on school finance??

## References

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- <sup>2</sup>Ladd, H. F., & Hansen, J. S. (1999). *Making money matter: Financing America’s schools*. Washington, DC: National Academy Press.
- <sup>3</sup>Bogenschneider, K., Friese, B., Balling, K., & Mills, J. (Eds.) (2002). *Early childhood care and education. What are other states doing?* (Wisconsin Family Impact Seminar Briefing Report No. 17, 48 pages) Madison, WI: University of Wisconsin Center for Excellence in Family Studies.
- <sup>4</sup>Harvard Family Research Project. (2003). A review of out-of-school time program quasi-experimental and experimental evaluation results. *Out-of-School Time Evaluation Snapshot, 1*, 1-12.
- <sup>5</sup>Epstein, J. L. (2001). *School and family partnerships: Preparing educators and improving schools*. Boulder, CO: Westview Press.
- <sup>6</sup>Van Voorhis, F. L. (2003, April) *What does a program of school, family, and community partnerships cost? Estimates from schools, districts, and states in the National Network of Partnership Schools*. Paper presented at the 11th International Roundtable on School, Family, and Community Partnerships, New Orleans, LA.
- <sup>7</sup>Family Impact Seminars (2003). Based on Family Impact Seminar conversations with Wisconsin legislators.
- Bogenschneider, K., & Gross, E. (2004). Evaluating school funding formulas checklist: What question should legislators ask? In K. Bogenschneider & E. Gross (Eds.), *A policymaker’s guide to school finance: Approaches to use and questions to ask* (pp. 15) (Wisconsin Family Impact Seminar Briefing Report No. 20, 54 pages). Madison, WI: University of Wisconsin Center for Excellence in Family Studies.