

# **BASIC EDUCATION**

## **FUNDING COMMISSION**



**FINAL REPORT 2023-24**



**January 11, 2024**

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## Executive Summary

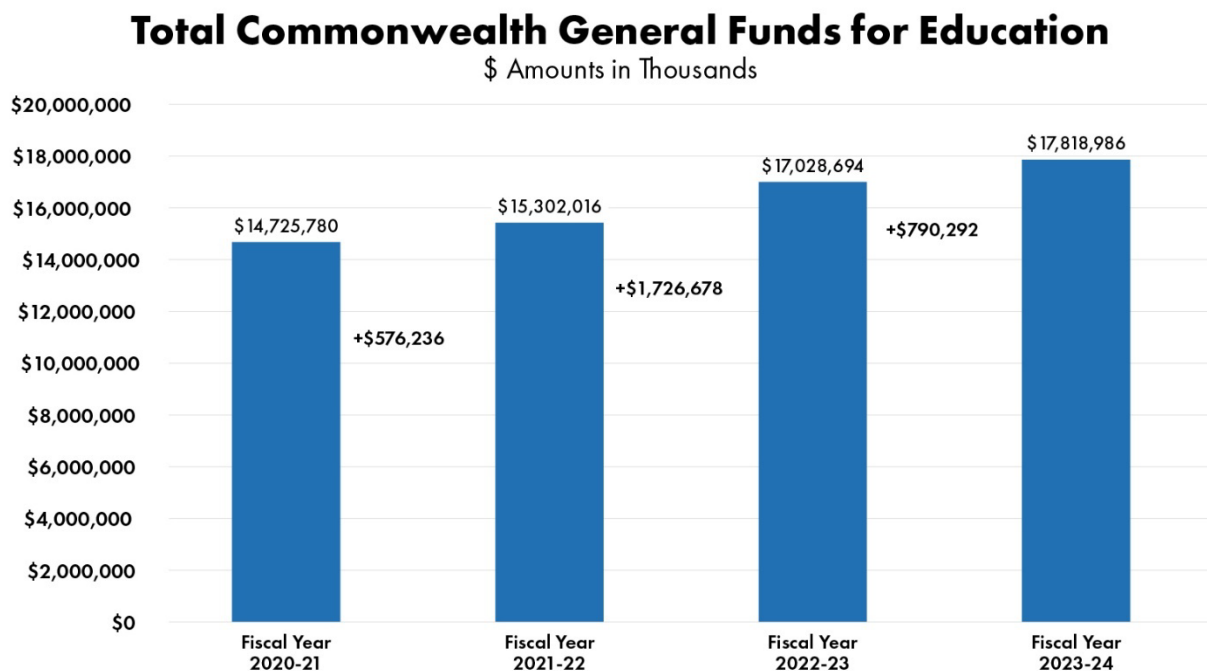
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Pennsylvania is home to 500 public school districts that educate more than 1.7 million students each year. Taxpayers provide significant resources to public schools through state, federal, and local taxes. School districts receive funding from various state appropriations, including, basic education, pension and social security reimbursements, special education, transportation reimbursement, teacher stipends, pre-kindergarten programming, school safety funding, and much more.

Basic education funding is the largest portion of funds that school districts receive from the Commonwealth. To achieve fairness in its distribution of these funds, the Pennsylvania General Assembly established the Basic Education Funding Commission in 2014.

By statute, the Basic Education Funding Commission is reconstituted every five years. The Commission released its inaugural report and recommendations to the General Assembly in 2015. The legislature and then-Gov. Tom Wolf adopted bipartisan recommendations to the formula in 2016.

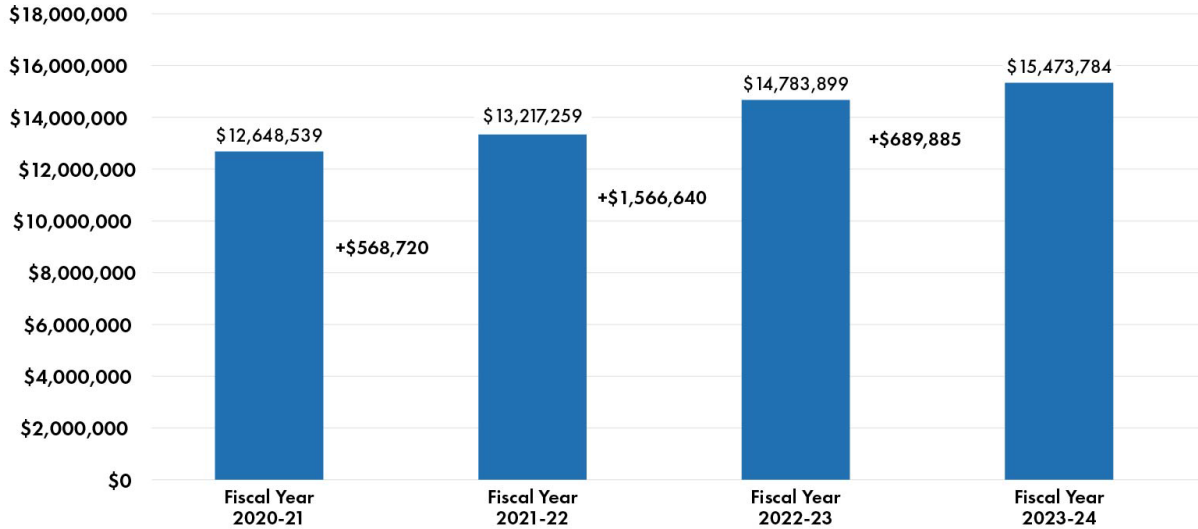
The Commonwealth makes a significant investment in education amounting to \$17.8 billion, which represents 40% of the state's General Fund.



In particular, the state's investment in public schools is significant, amounting to \$15.5 billion, an increase of \$2.8 billion since fiscal year 2021-22. This amounts to an average increase of \$942 million over the last three years.

## State Support of Public Schools

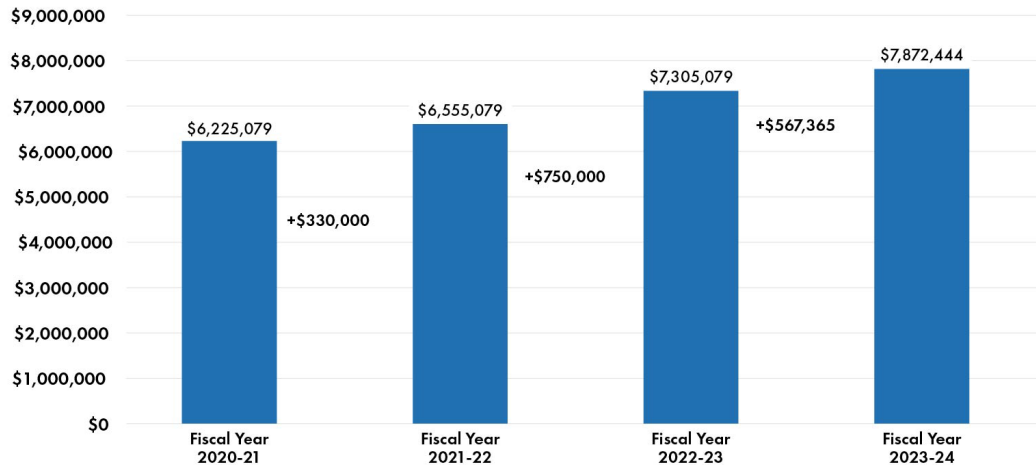
\$ Amounts in Thousands



Since the initial Basic Education Funding Commission's report was released and the formula was adopted, more than \$2.192 billion has been added to the basic education funding line item alone, representing a 38.6% increase in basic education over that time span. However, more recently, over the last four years, the state has made historic increases in the basic education subsidy, including the Level-Up supplements. These increases total \$1.65 billion, or 26%, over that time span.

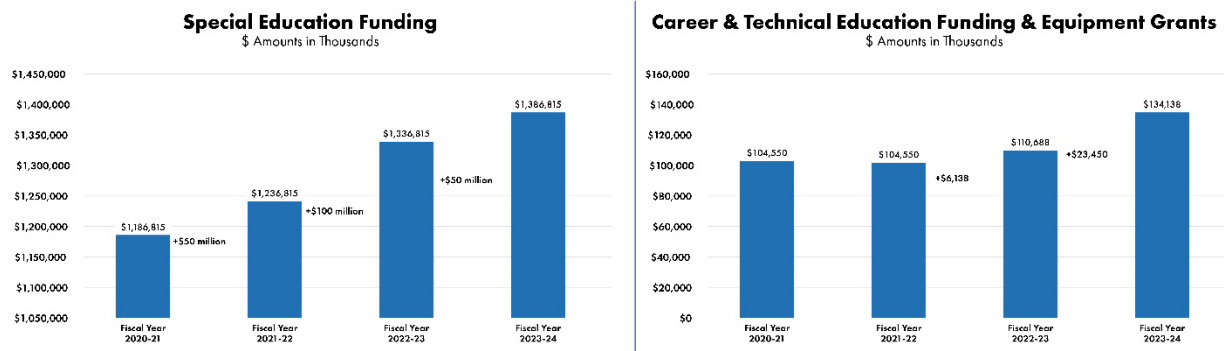
## Total Basic Education & Level Up Subsidies

\$ Amounts in Thousands





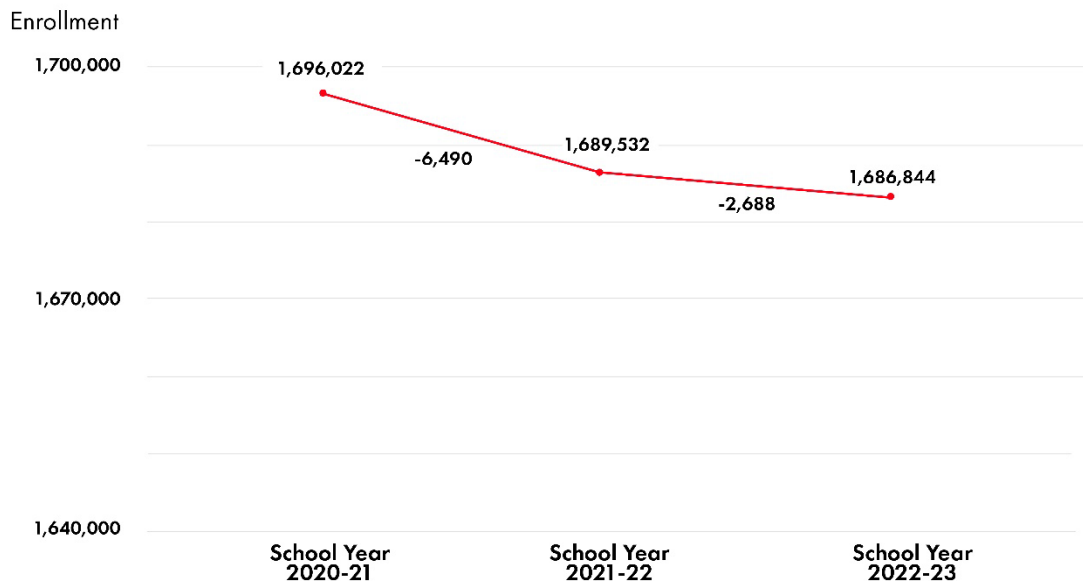
Since Fiscal Year 2020-21, the Commonwealth has made several additional large investments in other subsidies that benefit public education, including special education funding (\$200 million, or a 17% increase) and career and technical education (\$29.6 million, or a 28% increase).



Due to the COVID-19 pandemic, the Commission, which should have reorganized in 2020, was not reorganized until May 10, 2023.

Since the pandemic, the General Assembly and Governor have invested an additional \$2.8 billion into public education programs despite a drop in enrollment of more than 9,000 students.

## K-12 Enrollment



The Commission, co-chaired by Sen. Kristin Phillips-Hill (R-York) and Rep. Mike Sturla (D-Lancaster), held 14 hearings across the state to solicit input from stakeholder witnesses. The Commission received testimony from 92 witnesses, in addition to receiving public comment through its website from 1,104 individuals.

Testifiers included the Pennsylvania Department of Education, key plaintiffs in the Commonwealth Court lawsuit “William Penn School District et al. v. Pennsylvania Department of Education et al.,” school district superintendents, school business officers, and leaders representing various education advocacy organizations, business trade associations, taxpayer activists, nonprofit entities, and more.

The Commission heard about challenges with and suggestions to improve the Basic Education Funding Formula – comprised of two separate formulas – as well as programs that fall outside of the purview of the Commission (e.g., special education, facilities, property taxes, etc.)

Based on strong consensus from testifiers, including budget officials from several school districts, members of the Commission agreed that public education requires funding stability for greater predictability.

To address issues with predictably and stability, this report recommends resetting the base amount each district is allocated in basic education funding from the state included in the 2023-24 state budget. The report also suggests that future poverty data using the American Communities Survey, which is an auditable and accountable poverty statistic created by the U.S. Census Bureau, be averaged over a three-year span for formula distribution. The report acknowledges that poverty weights are significant in the distribution of tax dollars and, based on feedback to the Commission, averaging this data will create less volatility in the funding distribution.

Members of the Commission also support improving objective measurements to quantify and track outcomes of record state investments meant to fulfill the General Assembly’s constitutional obligation of a “thorough and efficient” system of public education.

The report highlights key steps the legislature and Governor Josh Shapiro have taken to prioritize urgent maintenance needs in public school facilities through recently enacted state laws, as well as recommending future steps to provide for greater uniformity, accountability, and resources to address with school district facility funding needs.

This report also suggests areas where the General Assembly could make bipartisan improvements to education policy, including assisting students in low-achieving schools immediately through the Pennsylvania Award for Student Success (PASS) program and property tax relief, among several other policy considerations.

Pursuant to Act 51 of 2014, the Commission will begin drafting legislation to implement recommended changes outlined in this report for the General Assembly to review and consider.

## Act 51 and the Charge to the Commission

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Pursuant to Act 51 of 2014, the General Assembly established a Basic Education Funding Commission, which is tasked with the following duties and responsibilities:

The Commission shall:

1. Review and make recommendations related to basic education funding. *Section 123(b)*. Review and make findings and recommendations related to basic education funding in this Commonwealth. *Section 123(i)(1)*.
2. Develop a basic education funding formula and identify factors that may be used to determine the distribution of basic education funding among the school districts in this Commonwealth. *Section 123(h)*. Review and consider basic education funding formulas and factors utilized throughout the United States. *Section 123(i)(5)*. Consider the impact that factors identified by the Commission may have on the distribution of basic education funding among the school districts. *Section 123(i)(6)*. Review the administration of state and regional basic education programs and services to determine if cost savings may be achieved and make recommendations to implement the savings. *Section 123(i)(7)*. Consider the potential consequences of a formula that does not allocate to each district at least the same level or proportion of state basic education funding as the district received in the prior school year. *Section 123(i)(8)*. The factors identified by the Commission may include all of the following:
  - a. The market value/personal income aid ratio averaged for each of the three most recent years of each school district. *Section 123(h)(1)*.
  - b. The equalized millage rate averaged for each of the three most recent years for each school district. *Section 123(h)(2)*.
  - c. Geographic price differences identified for each school district. *Section 123(h)(3)*.
  - d. Whether a school district has experienced exceptionally high enrollment growth. *Section 123(h)(4)*.
  - e. Whether a school district has an exceptionally high level of local support. *Section 123(h)(5)*.
  - f. Whether a school district has a high level of students in poverty as identified as eligible for free or reduced-price meals under the National School Lunch Program. *Section 123(h)(6)*.
  - g. Whether a school district has students identified as limited English proficient. *Section 123(h)(7)*.
  - h. Whether the district has a scarce or dense population in relation to the district size. *Section 123(h)(8)*.
  - i. Other factors related to the distribution of basic education funding. *Section 123(h)(9)*.

3. Receive input from interested parties, including, but not limited to, school districts and charter and cyber charter school operators. *Section 123(i)(3)*.
4. Consider nationally accepted accounting and budgeting standards. *Section 123(i)(9)*.
5. Issue a report of its findings and recommendations. *Section 123(i)(12)*.
6. Draft proposed regulations and proposed legislation based upon the Commission's findings. *Section 123(i)(11)*.

## Members of the Commission

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Act 51 of 2014 defined the requirements for the composition and operation of the Commission.

The Commission shall consist of the following 15 members (or their designees). *Section 123(c)(1)*:

1. Senate Education Committee Majority Chair
2. Senate Education Committee Minority Chair
3. House Education Committee Majority Chair
4. House Education Committee Minority Chair
- 5-8. Two Senators from each caucus appointed by the President Pro Tempore, in consultation with the Majority and Minority Leaders
- 9-12. Two Representatives from each caucus appointed by the Speaker, in consultation with the Majority and Minority Leaders
13. The Secretary of Education
14. The Deputy Secretary for Elementary and Secondary Education
15. An individual appointed by the Governor from within the Governor's Administration

The Commission shall appoint a member to serve as its chair.

Below are the members of the 2023-24 Basic Education Funding Commission:

Senate of Pennsylvania	
David G. Argall (R-29)	Education Committee Majority Chair
Vincent J. Hughes (D-7)	Appointee
Nick Miller (D-14)	Appointee
Kristin Phillips-Hill (R-28)	Co-Chair, Appointee
Greg Rothman (R-34)	Appointee
Lindsey Williams (D-38)	Education Committee Minority Chair

House of Representatives	
Mary Isaacson (D-175)	Appointee
Jason Ortity (R-46)	Appointee
Peter Schweyer (D-134)	Education Committee Majority Chair
Mike Sturla (D-96)	Co-Chair, Appointee
Jesse Topper (R-78)	Education Committee Minority Chair
Ryan Warner (R-52)	Appointee

Governor Josh Shapiro's Administration (Designee)	
Khalid Mumin (Marcus Delgado)	Education Secretary
Jeffrey Fuller (Angela Fitterer)	Deputy Secretary for Elementary and Secondary Education
Natalie Krug	Governor's Appointee from within the Administration



## Hearings of the Commission

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Act 51 of 2014 established the requirements for the hearings of the Basic Education Funding Commission.

The Commission shall:

1. Hold its first meeting within 45 days of the effective date of the section. *Section 123(d).*
2. Hold meetings at the call of the chair. *Section 123(e).*
3. Hold public hearings in different regions of the Commonwealth. *Section 123(i)(4).*
4. Consult with and utilize experts to assist the Commission in carrying out its duties. *Section 123(i)(2).*
5. Receive input from interested parties, including, but not limited to, school districts and charter and cyber charter school operators. *Section 123(i)(3).*

Members were appointed to the Commission in April of 2023. Subsequently, the Commission held the following hearings:

May 10, 2023	North Office Building, State Capitol, Harrisburg, PA
June 7, 2023	North Office Building, State Capitol, Harrisburg, PA
September 12, 2023	Allentown School District, Allentown, PA
September 13, 2023	North Office Building, State Capitol, Harrisburg, PA
September 14, 2023	School District of Philadelphia, Philadelphia, PA
September 21, 2023	School District of Lancaster, Lancaster, PA
September 28, 2023	South Western School District, Hanover, PA
October 5, 2023	Hazleton Area School District, Hazle Township, PA
October 11, 2023	Westinghouse Academy, Pittsburgh, PA
October 12, 2023	Penn State Fayette, Eberly Campus, Lemont Furnace, PA
November 2, 2023	Central Penn College, Summerdale, PA
November 9, 2023	Bedford Area School District, Bedford, PA
November 16, 2023	North Office Building, State Capitol, Harrisburg, PA
December 14, 2023	North Office Building, State Capitol, Harrisburg, PA

## **Testimony Received by the Commission**

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The following witnesses testified before the Commission at its public meetings:

- African American Charter School Coalition (Sept. 28)
- Mark Allen, CEO, Pennsylvania Leadership Charter School (Nov. 16)
- Hannah Barrick, JD, Executive Director, Pennsylvania Association of School Business Officials (Sept. 28)
- Dennis L. Benchoff Lieutenant General (Ret.), George M. Schwartz, Ed.D. Brigadier General (Ret.), Thomas J. Wilson, III Rear Admiral (Ret.), Mission Readiness (Dec. 14)
- Nathan Benefield, Senior Vice President, Commonwealth Foundation (Nov. 2)
- Dr. Carol Birks, Superintendent, Allentown School District (Sept. 12)
- Dominique Botto, Leader, POWER Interfaith (Sept. 21)
- Laura Boyce, Pennsylvania Executive Director, Teach Plus (Sept. 21)
- Christi Buker, CAE, Executive Director, Pennsylvania Library Association (Nov. 16)
- Mr. David A. Burkett, Superintendent, Everett Area School District, Pennsylvania Association of Rural and Small Schools (Oct. 12)
- Dr. Jay Burkhart, Superintendent, South Western School District (Sept. 28)
- Kevin Busher, Chief Advocacy Officer, Pennsylvania School Boards Association (Oct. 5)
- Dr. Tom Butler, Executive Director, Intermediate Unit-8 (Nov. 9)
- Aaron Chapin, President, Pennsylvania State Education Association (Nov. 9)
- Dr. Tina Chekan, CEO, Propel Charter Schools (Nov. 16)
- Sidney M. Clark, PCSBA, Business Manager/Board Secretary, Shanksville-Stonycreek School District; Chairperson, Somerset County TCC; Secretary/Treasurer, Mid-State Pennsylvania Association of School Business Officials (Nov. 9)

- Ashley Cocca, School Counselor, School District of Philadelphia (Sept. 14)
- Commonwealth Charter Academy (Dec. 14)
- Donna Cooper, Executive Director, Children First (Sept. 14)
- Dr. Darby Copeland, President, Pennsylvania Association of Career & Technical Administrators; Executive Director, Parkway West (Oct. 11)
- Brian Costello, Superintendent, Wilkes Barre School District (Sept. 13)
- Julie Cousler, Executive Director, Pennsylvania School-Based Health Alliance (Sept. 12)
- Anne-Marie Crawford, MSN, RN, NCSN, President, Pennsylvania Association of School Nurses and Practitioners (Oct. 11)
- Bob Curry, Co-founder, Hazleton Integration Project (Oct. 5)
- Dr. Betty Lee Davis, Ph. LCSW, Trauma Informed Education Coalition (Dec. 14)
- Susan DeJarnatt, Professor of Law, Temple University Beasley School of Law (Nov. 16)
- Christopher Dormer, Superintendent of Norristown School District (Sept. 14)
- Debi Durso, CEO/Principal, Green Woods Charter School; Policy Committee Member, Philadelphia Charters for Excellence (Nov. 16)
- Shelly Echeverria, Managing Director, Support Equity First (Nov. 16)
- Education Law Center (Nov. 16)
- Reverend Dr. Gregory Edwards, Chief of Staff, POWER Interfaith (Sept. 21)
- Dr. Ed Fuller, Penn State Center for Education Evaluation and Policy Analysis (Nov. 16)
- Joan Duval Flynn, Chairperson, Trauma Informed Education Coalition (Sept. 14)
- Danielle Farrie, Research Director, Education Law Center of NJ (Sept. 13)
- Angela Fitterer, Executive Deputy Secretary, Pennsylvania Department of Education (June 7)

- Mike Fogarty, Robert Kistler, Ryan Pertrusio, Henry Rothrock, Ron Snell, Bob Stilwell, The School Property Tax Elimination Working Group (Sept. 28)
- Lynn Fueini-Hetten, Superintendent, Salisbury School District (Sept. 12)
- Rossanna Gabriel, Executive Director, Hazleton Integration Project (Oct. 5)
- Kristen Haase, Senior Policy Fellow and SDOL Teacher, Teach Plus (Sept. 21)
- Alex Halper, Vice President, Government Affairs, Pennsylvania Chamber of Business and Industry (Nov. 2)
- Benjamin Hanft, Chief, Division of Subsidy Administration, Bureau of Budget & Fiscal Management, Pennsylvania Department of Education (June 7)
- Dr. Keith Hartbauer, Superintendent, Brownsville Area School District (Oct. 12)
- Warren Hudak, Hudak & Company (Nov. 2)
- Dr. Shawn Ginwright, Founder and CEO, Flourish Agenda (Sept. 14)
- Mike Griffith, Senior Researcher and Policy Analyst, The Learning Policy Institute (Sept. 13)
- Mary Beth Hays, Director of Philadelphia Healthy and Safe Schools, Temple University (Sept. 14)
- Jeni Hergenreder, Esq., Staff Attorney, Disability Rights Pennsylvania (Oct. 11)
- Dr. Marilyn Howarth, FACOEM, Deputy Director, Philadelphia Regional Center for Children's Environmental Health (Sept. 12)
- Dr. Richard Jensen, CEO, Agora Cyber Charter School (Nov. 16)
- Jerry Jordan, President, Philadelphia Federation of Teachers (Sept. 14)
- Mr. Matthew Joseph, Senior Policy Advisor, Education Funding, ExcelinEd (Oct. 12)
- Dr. Matthew Kelly, Assistant Professor, Penn State University (Sept. 12)
- Michael Kelly, KCBA Architects, AIA PA (Oct. 5)

- Robert Kistler, The School Property Tax Elimination Working Group (Nov. 2)
- Dr. Matthew Knittel, Director, Independent Fiscal Office (Dec. 14)
- Dr. Kyle Kopko, Executive Director, The Center for Rural Pennsylvania (Nov. 9)
- David Lapp, Director of Policy Research, Research for Action (Sept. 21)
- Angela Marks, Founder, Reading Allowed (Nov. 16)
- Dr. Donald Martin, Executive Director, Intermediate Unit-1 (Oct. 12)
- David McAndrews, Superintendent, Panther Valley School District (Sept. 13)
- Maura McNerney, Legal Director, Education Law Center (Sept. 13)
- Dave Mendell, President, Pennsylvania Association for Gifted Education (Nov. 16)
- Angela Mike, Executive Director of CTE, Pittsburgh Public Schools (Oct. 11)
- Dr. Keith Miles, Superintendent, The School District of Lancaster (Sept. 21)
- Patricia Moorhead, Director of Financial & Data Analytics, Pennsylvania Economy League (Nov. 9)
- Brenda Morales, Leader, POWER Interfaith (Sept. 21)
- Emily Neff, Director of Public Policy, Trying Together (Oct. 11)
- Dr. Adam Oldham, LPC, NCSC, High School Counselor, Pennsylvania Coalition of Student Services Associations (Nov. 16)
- PA Needs Teachers (Nov. 16)
- Dr. Garv Peiffer, Superintendent, Chartiers Houston School District (Oct. 12)
- Pennsylvania Educator Diversity Consortium (Nov. 16)
- Mr. Brian Polito, CPA, Superintendent, Erie City School District (Oct. 12)
- POWER Interfaith (Sept. 14)
- Public Interest Law Center (Nov. 16)



- Mark Price, Director of School Funding, Pennsylvania State Education Association (Nov. 9)
- Matt Przywara, Assistant Superintendent, The School District of Lancaster (Sept. 21)
- The Honorable Frank Ryan, former State Representative, The School Property Tax Elimination Working Group (Nov. 2)
- Dr. Robert Scherrer, Executive Director, Allegheny Intermediate Unit (Oct. 11)
- Ryan Schumm, Co-Founder, Charter Choices (Nov. 16)
- Lynne Shedlock, Acting Executive Director, Pennsylvania Economy League (Nov. 9)
- Fatoumata Sidibe, Student, William W. Bodine High School (Sept. 14)
- Dr. Jack Silva, Superintendent, Bethlehem School District (Sept. 12)
- Jessica Sites, Director, Bureau of Budget & Fiscal Management, Pennsylvania Department of Education (June 7)
- Aaron Smith, Director of Education Reform, Reason Foundation (Nov. 2)
- Dr. Sherri Smith, Executive Director, Pennsylvania Association of School Administrators (Sept. 28)
- Arthur Steinberg, President, American Federation of Teachers-Pennsylvania (Sept. 14)
- Marc Stier, Executive Director, Pennsylvania Policy Center (Sept. 21 & Nov. 16)
- Bob Stilwell, The School Property Tax Elimination Working Group (Nov. 2)
- Reginald L. Streater, School Board President, School District of Philadelphia (Sept. 14)
- Jane Swan, CEO, Reach Cyber Charter School (Nov. 16)
- Isaiah Thomas, Council Member At-Large, Philadelphia City Council (Sept. 14)
- Brian Uplinger, Superintendent, Hazleton School District (Oct. 5)
- Dan Urevick-Ackelsberg, Senior Attorney, The Public Interest Law Center (Sept. 13)
- Dr. Nathan Van Deusen, Superintendent, South Eastern School District (Sept. 28)

- Dr. Wayne Walters, Superintendent, Pittsburgh Public Schools (Oct. 11)
- Dr. Laura Ward, Past-President, Pennsylvania School Librarians Association; Librarian, Fox Chapel Area School District (Oct. 11)
- Dr. Tony Watlington, Superintendent, School District of Philadelphia (Sept. 14)

## Basic Education Funding Formula and Factors

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Act 51 of 2014 established and charged the Commission with developing a basic education funding formula and identifying factors that may be used to determine the distribution of basic education funding among school districts in the Commonwealth. The act also requires the Commission be reconstituted every five years to reexamine the operation of the basic education funding formula. Considering the legislative mandate of the Commission to reexamine the operation of the formula, individuals that came before it during public hearings presented testimony that focused attention on improving the existing formula and the factors used to determine the distribution of funding to school districts.

Both testifiers and Commission members believe the current basic education funding formula is a quality formula that needs minor adjustments to make it more predictable.

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*“The BEF formula is a good formula that uses multiple factors that define – at a very detailed and complex level – the needs, demographics and capacities at each school district, and it does precisely what it is intended to do – dynamically distribute resources to districts based on changes in populations and demographics.”*  
*Hannah Barrick, Executive Director, PASBO*

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Dr. Sherri Smith, Executive Director, Pennsylvania Association of School Administrators (PASA) testified, “When our school leaders are asked what is most important to them in education funding, they are most concerned with the predictability and sustainability in the funds.” School districts need to know the amount of funding they are likely to receive in advance so they can budget effectively and thoughtfully.

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*“PASA strongly supports the continued use of the Basic Education Funding Formula to distribute new basic education funds going forward [...] however, a review of the metrics in the formula is recommended to provide our school districts greater predictability of funding by smoothing out some of the high and low variances in payments from year-to-year.”*  
*Dr. Sherri Smith, Executive Director, PASA*

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## **Background**

On June 18, 2015, the first Basic Education Funding Commission recommended that the General Assembly adopt a new formula for distributing state funding in the basic education funding appropriation. The report’s executive summary stated, “the allocation of basic education funding needs to allow for accountability, transparency and predictability.”

The main objective of the new funding formula was to equitably distribute state resources according to various student and school district factors. The formula that was recommended included factors reflecting student and community differences such as poverty, local effort and capacity, and rural and small district conditions.

The Commission assisted with the drafting of legislation that reflected its recommendations which were then eventually enacted into law.

Beginning with the 2015-16 basic education funding allocation, each school district would receive at least the amount it received for the 2014-15 school year and a distribution of any additional appropriations through the new dynamic formula recommended by the Commission as follows:

### **Current Funding Formula**

#### **Student-Based Factors**

Student Count – Uses 3-year average of adjusted average daily membership (ADM)

- Adjusted ADM weight =1

Poverty – 5-year U.S. Census Bureau American Community Survey (ACS) Estimate

- ADM living in Acute Poverty (0-99%) weight = 0.6
- ADM living in Poverty (100-184%) weight = 0.3
- ADM in living Concentrated Poverty (> 30% Acute Poverty) weight = 0.3

English Language Learners – Uses school district's number of limited English proficient (LEP) students.

- LEP student weight = 0.6

Charter School Enrollment – Uses school district's charter school ADM

- Charter school ADM weight =0.2

#### **School District-Based Factors**

Sparsity-Size Adjustment

- Measures a school district's sparsity and size relative to the other 500 school districts and makes an adjustment to the weighted student count for small rural school districts.

Median Household Income Index

- Measures a school district's median household income compared to the statewide median household income.

Local Effort Capacity Index

- Measures a school district's local tax effort based on local tax revenue per household and its median household income compared to the State median.
- Makes an adjustment for excess spending based on a school district's current expenditures per student weighted ADM compared to the State median.
- Measures a school district's ability to generate local tax revenue per student weighted ADM compared to the State median.

## Formula Application

- The formula is applied by multiplying the sum of the student-based factors and the sparsity-size adjustment by the median household income index and the tax effort capacity index to determine the funding distribution factor. Each school district receives the amount it received in 2014-15 and a pro rata share of new funding based on the amount appropriated and the funding distribution factor.

The reconstituted Commission, pursuant to Section 123(k) of the Public School Code, is directed to review the operation of the basic education funding provisions and make a report. Our recommendations are as follows:

### Reset the stable base (hold harmless)

The basic education funding subsidy is made up of two components, the stable base (often referred to as “hold harmless”) and the dynamic formula. Presently, 75%, or \$5.9 billion, of the subsidy is distributed through the stable base, where each school district is guaranteed to receive at least the same amount of funding it received in the 2014-15 basic education funding allocation. The dynamic portion of the formula accounts for roughly 25%, or \$2 billion, of the subsidy and this amount changes annually for school districts based on the funding level and the student and school district-based factors of the school district.

The first Basic Education Funding Commission envisioned that the stable base and dynamic formula work together to ensure some level of predictability for school districts when budgeting. The dynamic formula would provide inflationary increases and the stable base would ensure predictability. However, as the amount of funding flowing through dynamic formula increased to nearly \$2 billion, fluctuations in school district allocations have become more pronounced and less predictable.

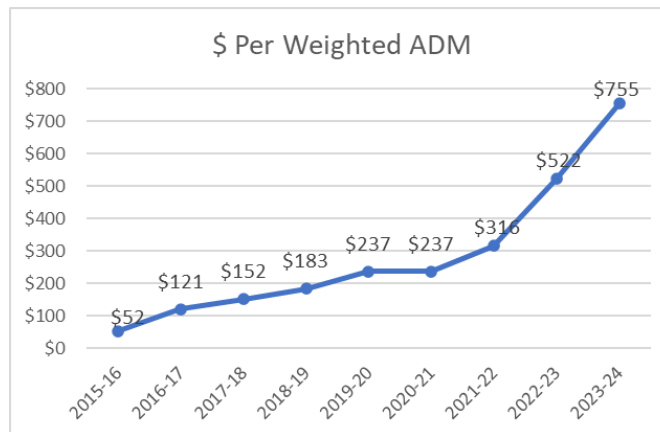
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*“Combining this increasing weighted student value with the dynamic nature of the formula, and predictability for school district school business officials is out the window.”*  
*Hannah Barrick, Executive Director, PASBO*

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The chart below illustrates the change in value of a student weighted ADM in the dynamic formula from \$52 to \$755 from 2015-16 to present.



Another example of the need for the stable base to guard against volatility in the formula is Sayre Area School District. In 2022-23, when basic education funding was increased by \$525 million, the school district qualified for the concentrated poverty weight and received an increase of \$729,845 over the previous year's level. Later, in 2023-24, when basic education funding was increased by \$567 million, a record amount, the school district fell off the poverty cliff and received just a \$27,761 increase in funding. In fact, without the record increase in funding, the school district would have received a significant reduction in basic education funding year-over-year from the combination of having fewer student weighted ADMs and the value of the student weighted ADM in the formula increasing by \$233, or 45%.

During the Commission's hearings several others testified on the importance of maintaining the stable base in the formula and resetting the base to a more current year. Dr. Sherri Smith, Executive Director, PASA noted in her testimony that, "maintaining the stable base in BEF subsidy is necessary to not create other unintended consequences and inequities in funding."

Additionally, Aaron Chapin, President, Pennsylvania State Education Association (PSEA) recommended that the base year be reset to a more current year.

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*"With almost ten years of formula use, readjusting the base to a more recent year creates balance between consistent, predictable funding and the more dynamic funding allocated through formula shares."*

*Aaron Chapin, President, PSEA*

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### **Smooth American Community Survey (ACS) Poverty Data using a 3-year average**

The Basic Education Funding Formula uses 5-year U.S. Census Bureau ACS to gauge levels of poverty, the number of households and the median family income in the Commonwealth's school districts. The ACS data serves as a proxy for state data that does not readily exist or is not uniformly reported or verifiable. Unfortunately, the ACS data is some of the most volatile data used in the formula. The reason for the volatility is likely due to small survey sample sizes in many school districts.

To mitigate the volatility of the ACS data, several testifiers suggested smoothing pieces of the ACS data over three years. Hannah Barrick, Executive Director, PASBO stated that, "smoothing both the percentages for acute poverty and poverty over three years would go a long way in mitigating some of the peaks and troughs for most districts."

Aaron Chapin, President, PSEA in his testimony suggested that the formula be revised to improve stability and predictability for school districts and recommended using a three-year average of the poverty count and the median household income index which incorporates the ACS data related to the number of households and median family income. He stated, "this is essential for school business managers, superintendents, and boards to make crucial decisions and commit to long-term programs and staffing needs."

A basic analysis of the change in percentage share of school districts' basic education funding from 2022-23 to 2023-24 using the current formula factors and a three-year average of the ACS data in 2023-24 appears to reduce volatility year-over-year when comparing the average change in share, median change in share and the standard deviation.

	Change in Share 22-23 to 23-24	Smooth ACS Data Change in Share 22-23 to 23-24
Statistics		
Average change	3.1%	0.1%
Median change	2.3%	-0.2%
Standard deviation	10.3%	7.2%

### **Eliminate/Soften Poverty Cliff**

The basic education funding formula includes three separate measures of poverty all derived from the ACS data. They are: (1) acute poverty, the number of students living in a school district below the federal poverty line; (2) poverty, the number of students living in a school district between 100% and 184% of the federal poverty line, and (3) concentrated poverty, which is applied to school districts with an acute poverty percentage greater than 30%.

The formula uses the ACS percentage for the acute poverty and poverty income thresholds for each school district and multiplies them by the school district's average daily membership to approximate the number of students living in acute poverty and poverty in the school district.

The volatile nature of the ACS data is heightened for school districts with acute poverty near the 30% threshold to qualify for concentrated poverty. Meeting the 30% concentrated poverty threshold allows an additional weight of 0.3 to be attributed to each student living in acute poverty and provides a significant increase in the school district's share of basic education funding. Conversely, if the school district subsequently falls below the threshold, it can result in a significant loss of funding.

*“The cliff component of this weight, along with the volatility in this metric, makes it extremely difficult for districts to predict their eligibility from year-to-year.”*

*Hannah Barrick, Executive Director, PASBO*

The number of school districts that qualify for concentrated poverty has ranged from 36 to 53 school districts annually.

The list of school districts that qualify for concentrated poverty is not uniform because the number of school districts that meet the threshold varies from year-to-year as several school districts' acute poverty percentages are near the 30% threshold.

The chart below shows the school districts that met the concentrated poverty threshold for the first time, or failed to meet the concentrated poverty threshold and previously met the threshold in the prior year.

Met Threshold						
2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Claysburg-Kimmel	Clarion Area	Antietam	Big Beaver Falls Area	Charleroi	East Allegheny	Big Beaver Falls Area
Fannett-Metal	Columbia Borough	Bristol Borough	Columbia Borough	Riverside	Greater Nanticoke Area	Charleroi
Forest Area	Greensburg Salem	Charleroi	Harmony Area	Salisbury-Elk Lick	Homer-Center	Corry Area
Pottstown	Jeannette City	Forest Area	Hazleton Area	Sto-Rox	Iroquois	Ferndale Area
Purchase Line	Mahanoy Area	Hanover Area	Jamestown Area	Windber Area	Mahanoy Area	Forest Area
Rochester Area	Mid Valley	Steel Valley	Marion Center Area		Millersburg Area	Lebanon
Steelton-Highspire	Mount Carmel Area	Windber Area	Union		Northern Cambria	Midland Borough
Uniontown Area	Salisbury-Elk Lick				Sayre Area	Minersville Area
Woodland Hills	Shanksville-Stonycreek				Smethport Area	Riverside
	Southeastern Greene				Uniontown Area	
	Uniontown Area				Weatherly Area	
	Washington				Williamsport Area	
Failed to Meet Threshold						
2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Carlynton	Forest Area	Big Beaver Falls Area	Albert Gallatin Area	Big Beaver Falls Area	Charleroi	Homer-Center
Mount Carmel Area	Monessen City	Columbia Borough	Antietam	Bristol Borough	Clairton City	Mahanoy Area
Hazleton Area	Oil City Area	Greater Nanticoke Area	Charleroi	Harmony Area	Columbia Borough	Millersburg Area
Clarion-Limestone Area	Purchase Line	Lebanon	Clarion Area	Hazleton Area	Fannett-Metal	Sayre Area
Uniontown Area		Mid Valley	Claysburg-Kimmel	Jamestown Area	Forest Area	Union
Wyoming Valley West		Panther Valley	Connellsville Area	Steel Valley	Lancaster	Uniontown Area
		Salisbury-Elk Lick	Greensburg Salem	Williamsport Area	Marion Center Area	Weatherly Area
		Shanksville-Stonycreek	Mahanoy Area		Midland Borough	Wilkes-Barre Area
		Titusville Area	Mount Carmel Area		Pottstown	Williamsport Area
		Washington	Pittsburgh		Riverside	
		Woodland Hills	Southeastern Greene		Rochester Area	
			Sto-Rox		Salisbury-Elk Lick	
			Uniontown Area		Scranton	
			Windber Area		Sharon City	
					Steelton-Highspire	
					Windber Area	

Also, in his testimony before the Commission, Aaron Chapin, President, PSEA, suggested establishing a “safe harbor” provision to ensure that school districts that fall off the cliff continue to receive the concentrated poverty weight for three to five years to adjust to the reduction in share of basic education funding. A safe harbor provision should help to provide greater predictability to school districts that are near the 30% threshold.

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*“Create a ‘safe harbor’ mechanism to ensure that a district cannot fall off the list of qualifying districts. Apply the safe harbor provision to districts for anywhere from three to five years. If a district goes back on the list, the clock stops, and then starts over every time a district falls off the list.”*

*Aaron Chapin, President, PSEA*

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Based on the most recent three years of ACS data, using a safe harbor provision that looks back at the acute poverty percentage for three years, a total of 57 school districts would qualify for concentrated poverty, 21 more than in the current year.

The chart below lists the 21 additional school districts that would receive the concentrated poverty weight using the safe harbor provision if it applied to the 2023-24 basic education funding allocation.

Clairton City	Millersburg Area	Steelton-Highspire
Columbia Borough	Pottstown	Union
Fannett-Metal	Rochester Area	Uniontown Area
Homer-Center	Salisbury-Elk Lick	Weatherly Area
Lancaster	Sayre Area	Wilkes-Barre Area
Mahanoy Area	Scranton	Williamsport Area
Marion Center Area	Sharon City	Windber Area

### **New Commission Recommendations**

- Reset the stable base (Hold Harmless).
- Smooth ACS poverty data using a 3-year average.
  - Median household income by school district and state median household income
  - Number of households.
  - Acute poverty (0-99%) and poverty percentages (100-184%).
- Eliminate/soften poverty cliff.
  - Provide safe harbor for school districts.
    - School district qualifies for concentrated poverty if 30% or greater acute poverty in any of the 3 most recent years ACS data.
    - Use 3-year average of ACS acute poverty data to determine the concentrated poverty ADM.

## **Revised Funding Formula**

### **Student-Based Factors**

Student Count – Uses 3-year average adjusted average daily membership (ADM)

- Adjusted ADM weight =1

Poverty – Use 3-year average of 5-year U.S. Census Bureau American Community Survey (ACS) Estimate

- ADM living in Acute Poverty (0-99%) weight = 0.6
- ADM living in Poverty (100-184%) weight = 0.3
- ADM in living Concentrated Poverty (> 30% Acute Poverty) weight = 0.3
  - Concentrated Poverty Safe Harbor
    - School district qualifies if > 30% Acute Poverty in any of the 3 most recent years ACS data.

English Language Learners – Uses school district's number of limited English proficient (LEP) students.

- LEP student weight = 0.6

Charter School Enrollment – Uses school district's charter school ADM

- Charter school ADM weight =0.2

### **School District-Based Factors**

Sparsity-Size Adjustment

- Measures a school district's sparsity and size relative to all 500 school districts and makes an adjustment to the weighted student count for small rural school districts.

Median Household Income Index

- Measures a school district's median household income compared to the statewide median household income using a 3-year average of 5-year ACS data used in the index.

Local Effort Capacity Index

- Measures a school district's local tax effort based on local tax revenue per household and its median household income compared to the State median using a 3-year average of 5-year ACS data used in the index.
- Makes an adjustment for excess spending based on a school district's current expenditures per student weighted ADM compared to the State median.
- Measures a school district's ability to generate local tax revenue per student weighted ADM compared to the State median.

### **Formula Application**

- The formula is applied by multiplying the sum of the student-based factors and the sparsity-size adjustment by the median household income index and the tax effort capacity index to determine the funding distribution factor. Each school district receives the amount it received in 2023-24 and a pro rata share of new funding based on the amount appropriated and the funding distribution factor.



## Weighted Basic Education Student Headcount Equation

$$\begin{aligned}
 & \frac{\text{Student Weight (1.0)}}{\text{Avg. Daily Membership (3-Year Average)}} + \frac{\text{Acute Poverty Weight (0.6)}}{\text{Number of Students in Acute Poverty}} + \frac{\text{Poverty Weight (0.3)}}{\text{Number of Students in Poverty}} + \frac{\text{Concentrated Acute Poverty Weight (0.3)}}{\text{Number of Students in Concentrated Poverty}} \\
 & + \frac{\text{English Language Learner Weight (0.6)}}{\text{Number of Limited English Proficient Students}} + \frac{\text{Charter School Weight (0.2)}}{\text{School District's Charter School Avg. Daily Membership}} = \text{Weighted Student Headcount}
 \end{aligned}$$

## Funding Distribution Number Equation

$$\left( \text{Weighted Student Headcount} + \text{Sparsity Size Adjustment} \right) * \text{Median Household Income Index} * \text{Local Effort Capacity Index} = \text{School District's Adjusted Weighted Student Headcount}$$

## Final School District Distribution Equation

$$\text{School District's Adjusted Weighted Student Headcount} * \$\$ \text{ Available for Basic Education Funding Allocation} \div \text{State Total Adjusted Student Weighted Headcount} = \text{School District's Share \$\$ Available for BEF Allocation}$$

## Facilities

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The Commission received numerous testimonies on the conditions of school facilities and the impact school infrastructure has on student health and learning. As such, members of the Commission believe it is necessary to highlight school facilities and the policy options that are available to address the pressing issue of school infrastructure.

According to testimony provided by the Pennsylvania School Boards Association, the most recent [State of Education report](#) (Association, 2023) revealed that nearly three-quarters of school districts reported having at least one school building in need of major repairs or replacement. Seventy percent of school districts report that they have postponed construction or renovation projects due to a lack of state reimbursement.

The Superintendent of the Allentown School District testified before the Commission that its infrastructure is aging and in need of replacement, updates, maintenance, and repairs. Superintendent Dr. Carol Birks reported that two-thirds of the district's buildings are over 50 years old, have physical deficiencies, and projects that addressing these deficiencies will cost over \$400 million. Some buildings have closed due to "extreme heat and the lack of air conditioning" this school year, which disrupted learning. Similar situations are seen in districts across the Commonwealth.

In addition to the maintenance needs of some school districts, some also need funding for new or expanded facilities due to growth. Superintendent Brian Uplinger of the Hazleton Area School District testified that the district's population has increased from approximately 11,500 in 2018-2019 to 13,200 in 2023-2024 with new enrollments continuing throughout the school year. Despite efforts to purchase properties and renovate facilities to create additional classroom space, the district continues to struggle to accommodate its growing student population. Other mandates related to accommodations for special education students have been challenging for the district, which has seen a 2-3% increase in its special education population since 2018-2019.

### History of School Facilities Funding

Until Act 82 of 2012, school construction and reconstruction project funding from the state to support school districts was provided through the Planning and Construction Workbook process, commonly referred to as PlanCon (now referred to as PlanCon 1.0). PlanCon 1.0 was a complicated 11- step process that provided for oversight, approval, and funding of new facilities or the expansion and renovation of existing facilities by the Department of Education.

By 2012, PlanCon 1.0 was facing serious administrative and financial challenges, and the Department of Education was falling behind reimbursing school districts under the program, further delaying project approvals. Act 82 began a year-to-year moratorium on the acceptance of new PlanCon applications by the department to provide an opportunity to conduct a series of reviews and reports.

The first [report](#) from the Department of Education showed that PlanCon was potentially underfunded by as much as \$160 million for the 2012-13 fiscal year, and that the moratorium on

applications should be maintained until the department could conduct a statewide survey of school facilities and future capital needs, which led to the passage of Act 59 of 2013 requiring such a survey.

The survey found that 66% of school facilities were constructed prior to 1970. However, the survey had a poor response rate, with only 33% of school buildings represented.

In Fiscal Year 2014-15, the PlanCon appropriation was \$306 million, but the program did not receive an appropriation in Fiscal Year 2015-16 or Fiscal Year 2016-17 as the funds to continue reimbursing school districts were made available through bond issuance.

Act 25 of 2016 established the Public School Building Construction and Reconstruction Advisory Committee (the “Advisory Committee”) to conduct a review of the PlanCon program and to make recommendations on how the program might be reconstituted. Act 25 also provided for reimbursements from an appropriation-backed bond issuance through the Commonwealth Financing Authority (CFA) to school districts with projects currently in the PlanCon process. The CFA issued those bonds, and the department processed payments to all school districts for PlanCon payments they were owed. There is no longer a backlog of new projects awaiting reimbursement.

While the bonds have contributed to paying off much of the legacy costs of PlanCon 1.0, there are \$2 billion in legacy costs remaining that will not be retired until 2059. The Fiscal Year 2022-23 and Fiscal Year 2023-24 General Fund appropriations included PlanCon 1.0 legacy costs of \$200 million and \$205 million, respectively. Payments in this line will peak in Fiscal Year 2025-26, and gradually decline until 2059.

In May of 2018, the Advisory Committee issued its [report](#) (Committee, 2018) with recommendations, many of which were enacted as amendments to the Public School Code in Act 70 of 2019. Sections 2602- J through 2609-J included trimming the PlanCon process down to 4 steps, the inclusion of an incentive to use high-performance building standards, providing a maintenance carve out of 20% of appropriated funds, a voluntary school building assessment incentive, a series of administrative steps to operate the program, and a school district reimbursement formula. This has become known as PlanCon 2.0.

## **PlanCon 2.0**

The four-step process includes 1) project justification, 2) construction documents submission and review, 3) project bid awards, and 4) project completion, including an audit of the building.

The Act includes a 10% reimbursement incentive for constructing projects with high-building performance standards. United States Green Building Council Leadership in Energy and Environmental Design (LEED) and Green Building Initiative’s Green Globes standards qualify for the incentive and the Department of Education is enabled to recognize additional standards that meet or exceed the standards of LEED’s or Green Globes.

The Department of Education is required to establish a maintenance program within PlanCon 2.0 that is 20% of the overall PlanCon appropriation. Eligible projects include:

- Roof repairs and roof replacement.
- Heating, ventilation, and air conditioning equipment.
- Boilers and controls.
- Plumbing systems.
- Energy savings projects.
- Health and safety upgrades.
- Emergencies.
- Other projects approved by the Secretary of Education.

The department is further required to design a scoring rubric for awarding maintenance grants and to prioritize maintenance project funding based on school district wealth, building conditions, safety and security, or if an emergency exists. There is a 50% match requirement unless an emergency exists, and no grant can exceed \$1 million or 20% of available funding.

The department is also required to develop guidelines for a voluntary school building conditions assessment that should be completed every 10 years by school districts. If a school district conducts the school building condition assessment, the department is instructed to award more points under the maintenance program scoring rubric or to provide a 2% increase in the reimbursement. To date, PlanCon 2.0 has not been funded and the department has not accepted any applications for the program due to an ongoing moratorium on the program.

The PlanCon 2.0 reimbursement formula is based upon four factors. First, there is a per pupil amount equal to the statewide median structural cost (\$18,251 per student). This amount is multiplied by the building capacity (lesser of enrollment or capacity of the new building space) and a local wealth factor that acts as an equity component. Finally, the reimbursement formula includes a legislative adjustment factor between 0 and 1 that enables the General Assembly to manage costs while keeping the program open.

This calculation yields a reimbursable amount that is capped at 65%. To illustrate, in the Department of Education's PlanCon 2.0 guidelines, a hypothetical project's reimbursement may look like:

$\$18,251 \times 925 \times .5285 \times .8 = \$7.1 \text{ million (per pupil amount) } \times (\text{building capacity}) \times (\text{market value aid ratio}) \times (\text{legislative adj. factor}) = \text{reimbursement amount}$

### **Act 33 and Act 34 of 2023**

On December 13, 2023, the General Assembly and the Governor enacted two bills that 1) establish a School Environmental Repairs Program, and 2) establish a Public School Facility Improvement Grant Program. A total of \$175 million was dedicated to the programs in the Fiscal Year 2023-24 budget.

The School Environmental Repairs Program in Act 33 will provide funding for projects that abate or remediate environmental hazards, including, but not limited to, the abatement or remediation of lead in water sources, asbestos, and mold inside the school buildings of eligible school entities.

The Public School Facility Improvement Grant Program in Act 34 will support school entity improvement projects including:

- Roof repairs and roof replacement.
- Heating, ventilation, and air conditioning equipment.
- Boilers and controls.
- Plumbing systems.
- Energy savings projects.
- Health and safety upgrades including lead and asbestos abatement or remediation and the purchase and maintenance of automated external defibrillators.
- Emergencies.
- Accessibility projects for individuals with disabilities.
- Internet connectivity.
- Demolition projects.
- Window repairs and window replacement.
- Other projects approved by the Commonwealth Financing Authority.

## Options

Based on the testimony received by the Commission in addition to the policies enacted under Acts 33 and 34 of 2023, the members of the Commission recommend the General Assembly:

- Require the Department of Education to collect school building conditions data by way of facility assessments conducted by school districts. Data collection should be done every five to ten years on a standardized form provided by the Department for uniformity.
- Require an identified school facilities coordinator who is responsible for reporting data and information to school boards, administrators, and the Department of Education.<sup>i</sup>
- Provide for school facility maintenance programs, such as the School Environmental Repairs Program established in Act 33 of 2023, the Public School Facility Improvement Grant Program established under Act 34 of 2023, and PlanCon 2.0 maintenance program.

The Basic Education Funding Commission requested that the Independent Fiscal Office, the Department of Education, the Pennsylvania Association of School Business Officials conduct a survey of 100 school districts to collect a wide variety of data including questions regarding facilities assessments. The school facilities assessment data can be found on pages 65-66.

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<sup>i</sup> In 2023, the PA Department of Education applied for and was awarded a Supporting America's School Infrastructure Grant from the US Department of Education. The grant will be used over five years to establish a team of three staff to support the needs of high-need school districts in Pennsylvania and assist those school districts with assessing their infrastructure needs and securing and leveraging resources to provide safe, healthy, sustainable, and equitable learning environments. Through the grant, the PA Department of Education will expand its capacity to proactively assist high-need districts with assessing their infrastructure needs, navigating federal, state, and local systems, and leveraging resources to improve the state's highest-need public schools as well as have current assessments to inform fiscal and policy decision making statewide.

## Adequacy

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The Education Clause of the Pennsylvania Constitution states: “[t]he General Assembly shall provide for the maintenance and support of a thorough and efficient system of public education to serve the needs of the Commonwealth.” [PA. CONST. art. III, § 14].

In *William Penn Sch. Dist. v. Pennsylvania Dep't of Educ.*, the Commonwealth Court was asked to define the meaning of a “thorough” and “efficient” system of education to support the “needs of the Commonwealth,” and, thereby, the standard for determining whether past and future investments by the General Assembly in that system meet that Constitutional obligation.

The Court concluded that the appropriate framework for evaluating whether the Constitutional duty under the Education Clause has been satisfied is “whether every student is receiving a meaningful opportunity to succeed academically, socially and civically, which requires that all students have access to a comprehensive, effective and contemporary system of public education.” *William Penn Sch. Dist. v. Pennsylvania Dep't of Educ.*, 294 A.3d 537, 886 (Pa. Cmwlth. Ct. 2023).

Testimony from fact and expert witnesses was taken by the Court regarding whether the resources available within the Commonwealth were adequate to meet this standard. Much of this testimony surrounded the 2005-2006 Costing Out Study, as a basis for establishing an “adequacy shortfall.” However, the Commonwealth Court was not convinced that the adequacy shortfalls derived from the 2005-2006 Costing Out Study definitively measured the amount of revenue districts throughout the Commonwealth currently need - and will need in the future - to provide each student a thorough and efficient education.

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*“The Costing Out Study calculated a \$4.38 billion shortfall as of 2005-06. However, that was 18 years ago, and given the passage of time, during which there have been innovations in technology, progress in educational pedagogies, fluctuations in the economy, and changes in so many other ways, this precise figure appears to be of limited relevance today. Similarly, Dr. Kelly’s calculated \$4+ billion shortfall, which is premised on the relevance and accuracy of the Costing Out Study’s shortfall, suffers from the same limitations.”*

*William Penn Sch. Dist. v. Pennsylvania Dep't of Educ.*, 294 A.3d 537, 910 (Pa. Cmwlth. Ct. 2023).

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But the court ultimately agreed that the evidence presented in the case showed that resources – whether monetary or otherwise – were not adequate to meet the needs of the students.

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*“While the Court questions the current relevance of the figures from the original Costing Out Study and, therefore, Dr. Kelly’s calculations based on those figures, it does accept the overarching principle that more equitable resources, whether monetary or otherwise, are needed...”*

*William Penn Sch. Dist. v. Pennsylvania Dep't of Educ.*, 294 A.3d 537, 910 (Pa. Cmwlth. Ct. 2023).

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We agree with the Commonwealth Court in *William Penn* when it stated that “every child can learn, regardless of individual circumstances, with the right resources...” *William Penn Sch. Dist.* at 931. The Commission heard testimony from various parties in the public hearings in broad terms regarding potential resources generally (i.e., the need for more teachers, more paraprofessionals, more student supports) for an adequate education and also what a per student spending amount would be to remedy an adequacy gap. However, the testimony before the Commission, as before the Court, fell into two categories: (1) broad testimony that “more” was needed without specifically calculating that need or providing a mechanism for its calculation; or (2) narrower testimony about per student spending that was grounded in the 2005-2006 Costing Out Study, the relevance of which was questioned by the Court.

Unfortunately, the Commission could not reach a consensus on a model for measuring adequacy to recommend to the General Assembly given these circumstances. Therefore, it is up to the General Assembly to determine the appropriate adequacy model.

We note that the prior four education Commissions did not recommend specific funding amounts as part of their reports to the General Assembly, and we recommend following that precedent here. This is consistent with the authority of the General Assembly as outlined in Section 123 of the Public School Code, which provides that “the General Assembly shall, through an annual appropriations process, determine the level of state funding used for basic education.”

Also of note is the following assessment from the Independent Fiscal Office’s (IFO) Economic and Budget Outlook for Fiscal Years 2023-24 to 2028-29: “For Fiscal Year 2023-24, there is a significant General Fund ending balance, but operating deficits for that year and all future years. The projected deficits are sufficient to eliminate the combined General Fund and Rainy Day Fund (includes interest accrual) balances by the end of the forecast period.” Due to the IFO’s budget projections, it would be imprudent for the Commission to recommend a funding amount for student adequacy that will prove to be unsustainable in the future.

That said, when the General Assembly takes up the issue of adequacy, in our view, any additional funding that districts would receive to address adequacy gaps must include an accountability component to ensure those districts invest in programs that focus on high-quality academics for students, especially those students who are economically disadvantaged and historically underperforming.

The Department of Education provided the Commission with proposed allowable uses of funding that would apply to districts that would potentially receive adequacy funding, which we believe would facilitate oversight and evaluation. The accountability component should follow the following principles:

- Funding uses should align to principles reflected in the Department of Education’s Accelerated Learning Toolkit and guidance provided to schools throughout the pandemic.
- Eligible schools may use funding to establish, maintain and/or expand programs.

- Schools should prioritize using funding for those efforts that improve outcomes for underperforming students, with a focus on Every Student Succeeds Act (ESSA) designated student subgroups.

<b>Focus on High-Quality Academics</b> - Define the instructional changes needed to ensure every student has access to the instructional strategies, resources and supports necessary to successfully engage with and master grade-level content.	
1.	PreK programs aligned with the current academic standards contained in 22 Pa. Code Ch. 4 (relating to academic standards and assessment). *
2.	Full-day kindergarten aligned with the current academic standards contained in 22 Pa. Code Ch. 4. *
3.	Class size reduction program such class size reduction program shall appoint and assign a minimum of one teacher for every 17 students or two teachers for every 35 students enrolled in a kindergarten, first, second or third grade classroom. *
4.	Improving the academic performance of subgroups identified under ESSA. *
5.	Programs to assist in the building of strong STEM and applied-knowledge skills. *
6.	Providing additional programs for continuing professional education that may include any of the following: training in mathematics, science and literacy-specific curriculum and instructional strategies; training in school-wide improvement planning; analysis of student achievement data, including student work and the implications for classroom practice; observing and studying exemplary school and classroom practices; implementing school-wide programs and classroom management strategies designed to improve student conduct; using technology to boost student achievement; conducting transition planning and curriculum alignment across schools and grade levels; or implementing secondary strategies to increase student engagement and personalize learning. *
7.	Structured literacy (aka science of reading) (i.e., professional development, diagnostic testing, curriculum development and integration).
8.	Math and literacy programs, including coaches, specialists, and/or other support professionals within schools to improve math and reading instruction. *
9.	Financial incentives to highly qualified, tenured teachers to work in the most academically challenged schools in a school district; to aid in the recruitment of certificated teachers, especially in high-need subject areas, to work in the most academically challenged schools in a school district; and to increase participation in education-related jobs, including outreach efforts to communities that have low participation in the education workforce. *
10.	Work-based or experiential learning and career readiness programs such as pre-apprenticeships, internships, postsecondary credits, industry-recognized credentials and other pathways to graduation and life after high school (i.e., college, military, work). *
11.	Purchasing materials or extending service hours for school libraries and/ or hiring school librarians. *
12.	Programs for instruction on world languages in the elementary and secondary grades, either in immersion classrooms or as separate periods of instruction. *



13. Programs to strengthen high school curricula by creating rigorous college and career preparatory programs, increasing academic achievement, offering additional advanced placement courses, such as AP/IB/ dual credit, providing school-based counseling, and providing professional development. *
14. Programs to provide intensive teacher training, professional development opportunities and teaching resources to teachers, particularly high-need subject areas. *
15. Developing/expanding career and technical education programs aligned to postsecondary credentials and occupations that earn a family-sustaining wage, including programs that lead to careers in education.
16. High-quality professional development for educators.
<b>Foster Supportive Learning Environments</b> - Create positive and supportive learning environments to support students and staff.
1. Establishing, expanding, or maintaining programs that promote the availability, coordination, integration, and utilization of student supports, associated resources and ancillary resources to meet the needs of children and families in addressing issues that may serve to limit student academic achievement. *
2. Serve students experiencing educational instability, in accordance with Act 1 of 2022 (on-time graduation solutions).
3. Targeted support for English Learners.
4. Increased inclusion for students with disabilities to be educated alongside their nondisabled peers, in accordance with the Individuals with Disabilities Education Act (IDEA), Section 504, Chapters 14 and 15.
<b>Establish Healthy System Conditions</b> - Engage partners- including students, parents, and educators- across your education community to fully understand the needs of your system and respond with staffing, technology, scheduling, and continuous improvement processes that create the conditions for acceleration of learning.
1. Expanding data analysis and use to inform and improve instructional practice (i.e., investing in data management and reporting systems, forming data teams, hiring a data quality specialist, etc.).
2. Assessment literacy (i.e., coaches, data teams, assessment types, local assessment plans, curriculum review cycle).
3. Any evidence-based strategy or program proven to improve educational outcomes for students (with a clear definition of “evidence-based strategy”).
<b>Design a System of Multi-Tiered Supports</b> - Provide a continuum of evidence-based academic and behavioral supports aligned with student needs.
1. Multi-tiered support programs.
2. Providing tutoring assistance during the normal school day and hours of the school district, provided that the tutoring is in addition to and does not interfere with a student's regularly scheduled classroom instruction times and does not supplant services required in a student's individualized education program. *

3. After-school, remediation and summer learning programs
4. Credit recovery programs.
5. Truancy support programs.

**Note:** Asterisks following items below indicate that similar language exists in Section 2599.2 of the School Code (PA Accountability Grants).

## **Other Recommendations**

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During the recent hearings, the Commission received critical testimony highlighting funding needs and other education-related issues across Pennsylvania's public education system, beyond adjustments to the basic education funding formula allocation.

Presenters including superintendents, academic experts, business leaders, nonprofits, and other education stakeholders emphasized a number of policy changes in need of consideration to provide every Commonwealth student access to a high-quality public education.

Key priorities identified in testimony span career readiness, educator recruitment and retention, school consolidation and shared services, after-school programs, school choice, school safety, technology, tutoring and other student supports, pension costs and property tax reforms.

As we make final recommendations on updating the Pennsylvania's basic education funding distribution, we cannot overlook these other education-related issues raised by stakeholders.

Comprehensive solutions, not funding alone, are required to ensure all school districts have the resources necessary to supply students with comprehensive learning opportunities that meet 21<sup>st</sup> century academic, civic, and social demands.

Recommendations should reinforce the state's commitment to supporting high-performing public education equitably across Pennsylvania's communities, but we believe that these policies priorities would be best addressed through the appropriate standing committees of the General Assembly.

Below are additional items of importance raised by testifiers that the Commission would like to highlight:

### **Career and Technical Education (CTE)**

The legislature should consider how to best support both regional-based and in-district models, including the provision of sustainable and predictable funding, in order to continue to strengthen Pennsylvania's emerging workforce and broader economic development. Needs, as identified by testifiers, include challenges related to costly or modern equipment as well as recruiting and retaining CTE educators.

### **Cyber Charter School Reimbursement**

The General Assembly should consider providing reimbursement to school districts for costs associated with cyber charter schools. Based on information provided by the Department of Education for the 2021-22 school year, school districts spend \$1.071 billion annually on cyber charter schools, \$682 million on tuition for nonspecial education students and \$389 million on tuition for special education students.

For many school districts, cyber charter school tuition costs pose a hardship. The number of students enrolling in cyber charter schools and leaving school district schools does not always allow for reductions in staffing or programing needs to offset the tuition costs.

A cyber charter school reimbursement formula could use the amount of tuition paid by school districts for cyber charter students and pay a specific percentage of the cost. This methodology was used to distribute reimbursements to school districts for charter and cyber charter schools for several years under Section 2591.1 (Commonwealth Reimbursements for Charter Schools and Cyber Charter Schools) of the Public School Code.

Another method of reimbursing school districts for cyber charter school tuition costs would be to assign a dollar value per cyber charter school student and multiply that amount by the number of students enrolled in the school district attending cyber charter schools.

## **Education Workforce**

### **Retirement (Pension)**

The Commonwealth makes significant investments in teacher pensions, with the second largest appropriation in the Department of Education's budget, the appropriation for the Commonwealth's share of the employer's retirement contribution for public school employees.

The Fiscal Year 2023-24 General Fund Budget includes \$2.995 billion for the appropriation for School Employees' Retirement. The Pennsylvania Public School Employees' Retirement System (PSERS) employer contribution rate is presently 34%, and the Commonwealth's appropriation is estimated to provide reimbursement for 57.5% of the public school entities' required contributions.

Since Fiscal Year 2010-11, the Commonwealth appropriation for School Employee's Retirement has grown by nearly \$2.7 billion (851%) to meet significant increases in the PSERS employer contribution rate caused by a combination of factors including unfunded benefit increases, poor investment returns and the Commonwealth's failure to make actuarially required contributions.

The dramatic and disproportionate increase in required PSERS contributions has placed a strain on the General Fund Budget and crowded out other needed investments in education at both the state and local level.

### **Teacher Pipeline**

There is a shortage of teachers in the Commonwealth that significantly impacts students' ability to learn. Recognizing this, the General Assembly established in Act 33 of 2023, the Educator Pipeline Support Grant Program under the Pennsylvania Higher Education Assistance Agency ("PHEAA") for individuals who are enrolled at an approved educator preparation program at an institution of higher education within the Commonwealth, meet the minimum grade point average requirement, are placed as a student teacher within the Commonwealth, and obtain all necessary clearances. The applicant must agree to work as a teacher at a school entity or nonpublic school for at least 3 years unless the agency determines there are extenuating circumstances.

The new program awards minimum grants of \$10,000, with an additional minimum \$5,000 grant available to those who complete their student teaching experience in a school entity that attracts few student teachers or has a high rate of open teaching positions. A minimum grant of \$2,500 is issued to the student's cooperating teacher unless the cooperating teacher receives compensation from the institution of higher education for their services.

### **School Choice**

#### **Pennsylvania Award for Student Success (PASS) Scholarship**

As the General Assembly works toward improving low performing schools, school choice should be available to students and their families, who lack resources, with immediate options to attend a high performing school.

#### **EITC/OSTC**

The General Assembly should continue its investments in educational tax credits for scholarship and educational improvement programs.

### **School District Mergers/Consolidations and Shared Services**

The Commission heard testimony from the Pennsylvania Economy League, the Intermediate Units, and other education stakeholders regarding the complexities of school district mergers and consolidations.

The presenters explained factors impacting the financial and operational viability of consolidation, presented the potential benefits of enhanced collaboration even short of full mergers, and asserted the Commonwealth has a pragmatic role to play in judiciously enabling further shared services or voluntary mergers between districts.

There are numerous logistic and political hurdles that make outright school district mergers rare and financially uncertain. One major barrier comes from the substantial transition costs of effectively combining pay scales, administrative systems, transportation routes, and school facilities between entities.

Fiscal uncertainties pose additional obstacles, as consolidating means one district essentially absorbs the debts, deficits, or cost overruns of their merger partner. This gives wealthier districts little incentive to join resource-strapped neighbors. Logistical issues like longer travel times from consolidated buildings or desire to preserve community identity via sports teams and school boards also spark local resistance.

Given these impediments, full-scale district consolidation often saves little money in the short-term. However, mergers potentially yield long-term efficiencies from larger enrollment bases and tax bases. The key tradeoff is higher transitional costs for theoretical long-run savings. Districts have sought scale through strength-in-numbers before, as when state pressure trimmed Pennsylvania districts from 2,361 in 1960 to around 500 today. But few voluntary mergers occur now without state incentives or technical support.

If outright consolidation seems cost-prohibitive or politically untenable, the testimony suggests, and we agree, less disruptive alternatives like sharing individual programs or services may be more viable places to start. For example, collaborating on specialized or advanced courses between districts would maximize student opportunity and achieve some economies of scale without requiring full administrative or operational mergers. Jointly offered extracurriculars constitute another option, aided by contemporary distance learning technologies. School districts have also formed consortiums to achieve efficiencies for health care and food purchasing.

Intermediate units already provide precedents for collaborative economies in Pennsylvania. Small districts can perhaps most pragmatically increase their individual scope and scale by tapping such existing shared functions. When outright unification faces too many cultural or financial hurdles, intermediate unit cooperation agreements may prove an incremental step with mutual gain.

Specific recommendations regarding consolidation and shared services include the following:

1. Embrace a phased approach to integration, beginning with shared programming or management prior to any complete district administrative consolidation. Intermediate units offer one template to smoothly expand from.
2. The Commonwealth should substantiate collective opportunities by funding consolidation impact studies and offering transitional aid without imposing sweeping unilateral measures better left to voluntary district discretion based on nuanced local constraints and contexts.
3. Pennsylvania should encourage further shared services or consolidation where beneficial but recognize one formula will not automatically fit all communities' educational priorities and objectives. Emphasis should be on providing financial incentives to school districts that want to right-size buildings and increase efficiencies.
4. Review and update Article XV-H (Administrative Partnerships Between School Entities) of the Public School Code. The intent of the article, which was enacted in 2016, was to help school entities save money and operate more efficiently by encouraging partnerships of routine administrative functions between school entities, and to provide for additional opportunities between school entities to cooperatively develop joint or shared educational programs for students and educators.

## **Poverty Metric**

The Commission recommends developing a new poverty metric prior to the next funding commission.

In testimony presented during Commission meetings and in discussion among Commission members, the poverty metric to recommend for use in the formula was a topic of significant conversation. Of particular concern is the volatility of the ACS poverty data due to small sample size and the fact the data represents students within the geography of a school district and not necessarily the students educated by a school district.

Dr. Matthew Kelly, Assistant Professor, Penn State University, a school funding scholar, when discussing the poverty data used stated that, “these indirect ACS estimates are highly variable and do not reflect the actual student populations districts educate.” Dr. Kelly also suggested using information collected by the Pennsylvania Department of Education directly from school districts about the number of low-income students enrolled, commonly referred to as economically disadvantaged data, to gauge poverty.

While it is believed that data collected directly from the school district would more accurately reflect a school district’s student population, concerns have been raised about the economically disadvantaged data. Hannah Barrick, Executive Director of PASBO noted that economically disadvantaged data does not require uniformity of application. Staff from the Pennsylvania Department of Education also present several concerns to the Commission regarding the economically disadvantaged data. The department’s concerns are as follows: the data does not collect information on severity of poverty; schools self-report the data; the data is not audited or monitored; directions for reporting the data are unclear and vague; the data is just a snapshot of a school district’s enrollment and doesn’t account for movement into or out of a school district; and school districts could count students that receive Medicaid but are of means.

Considering the problems with both the ACS data and the economically disadvantaged data, the Commission believes that the Pennsylvania Department of Education should develop a new poverty metric to replace ACS poverty data and provide greater confidence in the formula. This new poverty metric should be uniformly collected from school districts to better represent their actual student populations. It should be verifiable, monitored by the Department of Education and auditable. It should also collect the severity of poverty of the students enrolled.

## **Property Tax**

The General Assembly should consider significant and meaningful property tax relief when deliberating on how to fairly fund education in Pennsylvania. Property taxes continue to be a large portion of taxpayer contributions to education. This cost is often unfairly and disproportionately borne by individuals in certain areas. Seniors, in particular, bear a significant burden and risk losing their homes in the face of ever-rising property taxes. Additionally, schools within districts that have higher home values often receive significantly less state support.

The Commission received written and verbal testimony from the School Property Tax Elimination Working Group and hundreds of public comments imploring the Commission and legislature to examine property tax relief as part of the school funding calculus.

### **School Safety**

Beginning in the 2018-19 school year, the General Assembly recognized the need to provide funding for school safety and security and in the 2022-23 school year added school mental health grants. Every year since the establishment of the School Safety and Security Committee, important investments have been made in grants to school districts for programs that address these issues including COVID related health and safety. Since 2018-19, more than \$503 million in grants have been provided to school entities through the Pennsylvania Commission on Crime and Delinquency's School Safety and Security Committee for school safety, school mental health and school health and safety.

### **Technology**

The General Assembly should consider the ongoing costs of continuing and maintaining technology established in each school entity during the COVID-19 pandemic. The Commission recognizes the value technology has as an instrumentality of learning and that such technology can be used to expand educational opportunities between districts and enhance student achievement.

### **Tutoring/Student Supports**

The General Assembly should consider evidence-based interventions to maximize investments in student achievement. The Commission recognizes that tutoring programs and other learning times and opportunities benefit students in a targeted way to meet students' needs and address shortfalls. The Department of Education should consider best practices to improve coordination between the school district, the schools, and community partners to identify and complement existing supports.



## Public Hearings and Testimony

<b>June 7, 2023 – Harrisburg</b>	Senate Hearing Room #1, North Office Building, State Capitol Complex
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Angela Fitterer, Executive Deputy Secretary of Education	Pennsylvania Department of Education
Jessica Sites, Director, Bureau of Budget & Fiscal Management	Pennsylvania Department of Education
Benjamin Hanft, Chief, Division of Subsidy Administration, Bureau of Budget & Fiscal Management	Pennsylvania Department of Education

<b>September 12, 2023 – Allentown</b> BEFC member hosts: Rep. Pete Schweyer and Senator Nick Miller	Allentown School District Board Room
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Matthew Kelly, Ph.D., Assistant Professor	The Pennsylvania State University
Carol Birks, Ed.D., Superintendent	Allentown School District
Jack Silva, Ed.D., Superintendent	Bethlehem Area School District
Lynn Fueini-Hetten, Superintendent	Salisbury Township School District
Julie Cousler, Executive Director	Pennsylvania School-Based Health Alliance
Marilyn Howarth, M.D., Deputy Director	Philadelphia Regional Center for Children's Environmental Health

<b>September 13, 2023 – Harrisburg</b>	Senate Hearing Room #1, North Office Building, State Capitol Complex
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Dan Urevick-Ackelsberg, Senior Attorney	The Public Interest Law Center
Maura McNerney, Legal Director	Education Law Center
David McAndrews, Superintendent	Panther Valley School District
Brian Costello, Ed.D., Superintendent	Wilkes-Barre Area School District
Mike Griffith, Senior Researcher and Policy Analyst	The Learning Policy Institute
Danielle Farrie, Ph.D., Research Director	Education Law Center of New Jersey

<b>September 14, 2023 – Philadelphia</b> BEFC member hosts: Senator Vincent Hughes and Rep. Mary Isaacson	The School District of Philadelphia Board Room
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Tony Watlington, Ed.D., Superintendent	The School District of Philadelphia
Christopher Dormer, Superintendent	Norristown Area School District
Arthur Steinberg, President	American Federation of Teachers, Pennsylvania
Jerry Jordan, President	Philadelphia Federation of Teachers
Ashley Cocca, School Counselor	The School District of Philadelphia
Fatoumata Sidibe, Student	William W. Bodine High School
Donna Cooper, Executive Director	Children First
Joan Duval Flynn, Chairperson	Trauma Informed Education Coalition
Mary Beth Hays, Director of Philadelphia Healthy and Safe Schools	Temple University
Shawn Ginwright, Ph.D., Founder and CEO	Flourish Agenda

<b>September 21, 2023 – Lancaster</b> BEFC member host: Co-chair Mike Sturla	School District of Lancaster Board Room
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
David Lapp, Director of Policy Research	Research for Action
Marc Stier, Ph.D., Executive Director	Pennsylvania Policy Center
Laura Boyce, Pennsylvania Executive Director	Teach Plus
Kristen Haase, Senior Policy Fellow and SDOL Teacher	Teach Plus
Dominique Botto, Leader	POWER Interfaith
Brenda Morales, Leader	POWER Interfaith
Reverend Gregory Edwards, D.Min., Chief of Staff	POWER Interfaith
Keith Miles, Ed.D., Superintendent	School District of Lancaster
Matt Przywara, Assistant Superintendent	School District of Lancaster

<b>September 28, 2023 – Hanover</b> BEFC member host: Co-chair Kristin Phillips-Hill	South Western School District Board Room
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Hannah Barrick, J.D., Executive Director	Pennsylvania Association of School Business Officials
Sherri Smith, Ed.D., Executive Director	Pennsylvania Association of School Administrators
Jay Burkhart, D.Ed., Superintendent	South Western School District
Nathan Van Deusen, Ed.D., Superintendent	South Eastern School District

<b>October 5, 2023 – Hazleton</b> BEFC member host: Senator David Argall	Hazleton Area School District Administration Building
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Kevin Busher, Chief Advocacy Officer	Pennsylvania School Boards Association
Michael Kelly, Principle of Design, KCBA Architects	The Pennsylvania Chapter of the American Institute of Architects
Brian Uplinger, Ed.D., Superintendent	Hazleton Area School District
Victor Perez, President	La Casa Dominicana de Hazelton, Inc.
Bob Curry, Co-Founder	Hazleton Integration Project
Rossanna Gabriel, Executive Director	Hazleton Integration Project

<b>October 11, 2023 – Pittsburgh</b> BEFC member host: Senator Lindsey Williams	Pittsburgh Public Schools – Westinghouse CTE Suite
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Angela Mike, Director of the Career and Technical Education (CTE) Division	Pittsburgh Public School District
Darby Copeland, Ed.D., President; Executive Director	Pennsylvania Association of Career & Technical Administrators; Parkway West
Robert Scherrer, Ed.D., Executive Director	Allegheny Intermediate Unit
Emily Neff, Director of Public Policy	Trying Together
Jeni Hergenreder, Esq., Staff Attorney	Disability Rights of Pennsylvania
Laura Ward, Ed.D., Past President; Librarian	Pennsylvania School Librarians Association; Fox Chapel Area School District

<b>October 12, 2023 – Lemont Furnace</b> BEFC member hosts: Rep. Jason Ortity and Rep. Ryan Warner	Penn State Fayette – Magerko Auditorium
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Matthew Joseph, Senior Policy Advisor, Education Funding	ExcelinEd
David Burkett, Board Member; Superintendent	Pennsylvania Association of Rural and Small Schools; Everett Area School District
Gary Peiffer, Ed.D., Superintendent	Chartiers-Houston School District
Keith Hartbauer, Ph.D., Superintendent	Brownsville Area School District
Donald Martin, Ed.D., Executive Director	Intermediate Unit 1
Brian Polito, CPA, Superintendent	Erie City School District

<b>November 2, 2023 – Summerdale</b> BEFC member host: Senator Greg Rothman	Central Penn College Conference Center
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Alex Harper, Vice President of Government Affairs	Pennsylvania Chamber of Business and Industry
Warren Hudak, President	Hudak & Company
Nathan Benefield, Senior Vice President	Commonwealth Foundation
Bob Stilwell	The School Property Tax Elimination Working Group
Frank Ryan, Former State Representative	The School Property Tax Elimination Working Group
Robert Kistler	The School Property Tax Elimination Working Group

<b>November 9, 2023 – Bedford</b> BEFC member host: Rep. Jesse Topper	Bedford High School Auditorium
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Aaron Chapin, President	Pennsylvania State Education Association
Mark Prince, Ph.D., Director of Research for School Funding	Pennsylvania State Education Association
Sidney Clark, Business Manager	Shanksville-Stonycreek School District
Lynn Shedlock, Acting Executive Director	Pennsylvania Economy League
Kyle Kopko, Ph.D., Executive Director	The Center for Rural Pennsylvania
Tom Buter, Ph.D., Executive Director	Intermediate Unit 8

<b>November 16, 2023 – Harrisburg</b>	Senate Hearing Room #1, North Office Building, State Capitol Complex
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Ryan Schumm, Executive Officer	Charter Choices
Debi Durso, Chief Executive Officer/Principal	Green Woods Charter School
Tina Chekan, Ed.D., Chief Executive Officer	Propel Charter Schools
Jane Swan, Chief Executive Officer	Reach Cyber Charter School
Richard Jensen, Ed.D., Chief Executive Officer	Agora Cyber Charter School
Mark Allen, Chief Executive Officer	Pennsylvania Leadership Charter School
Adam Oldham, High School Counselor	Pennsylvania Coalition of Student Services Associations
Christi Bucker, CAE, Executive Director	Pennsylvania Library Association
Angela Marks, Founder	Reading Allowed
Susan DeJarnatt, Professor of Law	Temple University Beasley School of Law

<b>December 14, 2023 – Harrisburg</b>	Senate Hearing Room #1, North Office Building, State Capitol Complex
<b>PRESENTERS:</b>	<b>AFFILIATION:</b>
Matthew Knittel, Ph.D., Director	Independent Fiscal Office



### INDEPENDENT FISCAL OFFICE

**TO:** Honorable Members of the Basic Education Funding Commission

**FROM:** Matthew Knittel, Director  
Independent Fiscal Office

**DATE:** December 14, 2023

**RE:** Results from the 2023 Basic Education Funding Commission Survey

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This document provides summary tabulations for the Basic Education Funding Commission (BEFC) survey sent by the Pennsylvania Department of Education to 100 school districts and 25 charter schools in October 2023. The data reflect all responses submitted by survey recipients. The school districts and charter schools surveyed represent the same sample used in the April 2015 BEFC survey to facilitate a comparison between the two surveys. All survey questions are the same as the April 2015 survey except for four new questions that pertain to facility assessments. Results from the prior survey can be found in the "*Basic Education Funding Commission Report and Recommendations*" (June 18, 2015).

The BEFC received 84 completed school district surveys (84% response rate) and 11 charter school surveys (44%). Because large districts and charters submitted surveys, response rates weighted by the share of the student population surveyed are higher: 93% for school districts and 72% for charters. For the 2015 survey, the comparable weighted response rates were 89% (school districts) and 77% (charters).

The office would like to thank all survey respondents, the Pennsylvania Department of Education (PDE), the Pennsylvania Association of School Business Officials (PASBO) and BEFC staff for their assistance with the administration of this survey.

## Introduction

This document provides summary data from the Basic Education Funding Commission (BEFC) survey sent to 100 school districts and 25 charter schools in October 2023. The statistics reflect all responses submitted by survey recipients. Relevant comments or clarifications are included in the notes to tables.

The school districts and charter schools surveyed in October 2023 use the same sample and data groups as the April 2015 BEFC survey to facilitate a comparison between the two surveys. The sample selection process used data from school year (SY) 2012-13 and separated districts into four groups based on their SY 2012-13 school performance profile (SPP) score: (1) high performance (SPP 90.0%+), (2) good (80.0-89.9%), (3) proficient (70.0-79.9%) and (4) low performance (<70.0%) schools.<sup>1</sup> It is noted that the computation of district SPP scores was discontinued shortly after the 2015 survey. However, based on other performance metrics computed for SY 2021-22, most districts maintained their relative performance level compared to other districts included in the sample. Therefore, the same relative groupings still generally apply for SY 2021-22 (i.e., high performers in SY 2012-13 remain high performers now).

The two tables that follow provide cross tabulations for 499 school districts across the four SPP groups based on four metrics: (1) share of economically disadvantaged (ED) students, (2) share of English learners (ELs), (3) taxable income per average daily membership (ADM) and (4) regular instruction costs per ADM. While the SPP groups use scores from SY 2012-13, all other data are from SY 2021-22, the data year used by 2023 survey respondents. All tabulations are weighted by the number of ADM.

The top half of the table below displays the number and share of school districts and ADM across the four SPP groups. The data show that 83 high-performing districts comprised 24.4% of total ADM for SY 2021-22, while 91 low-performing districts comprised 29.3% of total ADM. The bottom half displays average values for the four metrics across the groups, weighted by the number of ADM. The data reveal that SPP scores have (1) a negative relation with ED and EL concentration, (2) a positive relation with taxable income per ADM and (3) no clear relation with regular instruction cost per ADM.

School District Characteristics by SPP Score					
	School Performance Profile (SPP) Score				Total
	90.0%+	80.0-89.9%	70.0-79.9%	<70.0%	
<b>Number of School Districts</b>	<b>83</b>	<b>151</b>	<b>174</b>	<b>91</b>	<b>499</b>
Share of Total	16.6%	30.3%	34.9%	18.2%	<b>100.0%</b>
<b>Total ADM (000s)</b>	<b>412,577</b>	<b>432,837</b>	<b>347,917</b>	<b>494,171</b>	<b>1,687,503</b>
Share of Total	24.4%	25.6%	20.6%	29.3%	<b>100.0%</b>
<b>Weighted Avg. (by ADM)</b>					
ED Student Concentration	21.8%	38.0%	47.6%	71.4%	<b>45.8%</b>
EL Student Concentration	2.7%	2.7%	2.4%	11.4%	<b>5.2%</b>
Taxable Income per ADM	\$425,169	\$266,764	\$205,081	\$174,349	<b>\$265,712</b>
Reg. Instruction Costs per ADM	\$8,830	\$8,029	\$8,197	\$8,729	<b>\$8,464</b>

<sup>1</sup> For a complete description of the selection of school districts and charter schools, see page 99 to 105 in the "Basic Education Funding Commission Report and Recommendations" dated June 18, 2015.



The table on the next page provides greater detail and shows how students are dispersed across the four groups and four metrics. All percentages in the table are weighted by ADM, and the individual cells sum to 100%. For example, the table shows that 19.2% of total ADM (third data row, first data column) were in a district with an SPP score higher than 90% and an ED concentration below 30%. School districts with an SPP score below 70% and an ED concentration higher than 70% (sixth data row, fourth data column) reported 20.7% of total ADM. This presentation is repeated for the four metrics.

The data for all districts reveal the following trends across the four SPP groups:

ED Student Concentration The high-performance group (SPP 90%+) has a much lower concentration of ED students. For that group, 79% (19.2 / 24.4) of students attended a school district where less than 30% of students were ED. By contrast, no students in the low-performance group (SPP < 70.0%) attended a school district where less than 30% of students were ED. Rather, the majority (71% or 20.7 / 29.3) attended a district where more than 70% of students were ED.

EL Student Concentration Similar results hold for the concentration of EL students. The top three groups have much lower concentrations of EL students than the low-performance group.

Taxable Income per ADM This metric may capture intangibles outside of school that are positively related to SPP scores. The high-performance group has a much higher taxable income per ADM compared to the low-performance group.

Regular Instruction Costs per ADM This metric generally reflects classroom costs only and excludes expenses related to debt, special education and administrative costs. Compared to other metrics, the data are less clear regarding the relation between regular instruction spending per ADM and SPP scores. For example, roughly 12% (2.9 / 24.4) of students in the high-performance group attended a school district where this metric fell below \$7,500. For the low-performance group, the comparable figure is 18% (5.2 / 29.3).



### Detailed School District Characteristics by SPP Score

	School Performance Profile (SPP) Score				Total
	90.0%+	80.0-89.9%	70.0-79.9%	<70.0%	
Number of School Districts	83	151	174	91	499
Share of All Students (ADM)	24.4%	25.6%	20.6%	29.3%	100.0%
<b>ED Student Concentration</b>					
<30.0%	19.2%	7.4%	0.8%	0.0%	27.4%
30.0 - 49.9%	5.2%	13.9%	10.7%	1.4%	31.2%
50.0 - 69.9%	0.1%	4.4%	8.4%	7.1%	20.0%
70.0%+	<u>0.0%</u>	<u>0.0%</u>	<u>0.7%</u>	<u>20.7%</u>	<u>21.4%</u>
<b>Total</b>	<b>24.4%</b>	<b>25.6%</b>	<b>20.6%</b>	<b>29.3%</b>	<b>100.0%</b>
<b>EL Student Concentration</b>					
<1.0%	3.1%	10.1%	10.4%	4.3%	27.8%
1.0% - 4.99%	18.6%	11.3%	6.8%	3.5%	40.2%
5.0%+	<u>2.8%</u>	<u>4.2%</u>	<u>3.4%</u>	<u>21.5%</u>	<u>31.9%</u>
<b>Total</b>	<b>24.4%</b>	<b>25.6%</b>	<b>20.6%</b>	<b>29.3%</b>	<b>100.0%</b>
<b>Taxable Income per ADM</b>					
<\$125,000	0.0%	0.1%	0.5%	6.9%	7.5%
\$125,000 - \$199,999	0.1%	6.3%	9.8%	18.0%	34.2%
\$200,000 - \$249,999	1.5%	8.5%	6.9%	2.4%	19.3%
\$250,000+	<u>22.9%</u>	<u>10.8%</u>	<u>3.4%</u>	<u>1.9%</u>	<u>39.0%</u>
<b>Total</b>	<b>24.4%</b>	<b>25.6%</b>	<b>20.6%</b>	<b>29.3%</b>	<b>100.0%</b>
<b>Reg. Instruct. Costs per ADM</b>					
<\$7,500	2.9%	10.0%	6.9%	5.2%	25.0%
\$7,500 - \$9,999	18.4%	13.0%	12.6%	22.2%	66.1%
\$10,000+	<u>3.2%</u>	<u>2.7%</u>	<u>1.1%</u>	<u>1.9%</u>	<u>8.8%</u>
<b>Total</b>	<b>24.4%</b>	<b>25.6%</b>	<b>20.6%</b>	<b>29.3%</b>	<b>100.0%</b>

Note: All tabulations are weighted by the school district's share of total Average Daily Membership (ADM). Excludes Bryn Athyn SD because there are less than 10 students. Regular Instruction Costs is 1100 Regular Programs - Elementary/Secondary.

### Survey Sample and Response Rate

In October 2023, the BEFC survey was sent to 100 school districts and 25 charter schools. Through December 1, 2023, the BEFC received 84 completed school district surveys (84% response rate) and 11 charter school surveys (44%). Because large districts and charters had higher response rates, responding school districts comprise 93% of students for those surveyed, and responding charters comprise 72% of students for those surveyed.

Per instructions from the BEFC, the survey sample is representative of school districts across the four SPP groups and is geographically diverse. The sample was constructed to oversample "good school districts" with an SPP score between 80.0% and 89.9% that also had ED, EL, taxable income per ADM and instructional cost per ADM characteristics that were representative of statewide median values. (For a complete description of the sample selection methodology, see page 99 of the *"Basic Education Funding Commission Report and Recommendations,"* June 18, 2015.) As shown in the table, the survey sample also includes a disproportionate number of districts with high ED concentrations.

Surveyed and Responding School Districts and Charter Schools					
	School Performance Profile (SPP) Score				Total
	90.0%+	80.0-89.9%	70.0-79.9%	<70.0%	
All School Districts	83	151	174	91	499
Surveyed Districts	13	58	19	10	100
Sample Rate	15.7%	38.4%	10.9%	11.0%	20.0%
Responding Districts	10	48	16	10	84
Response Rate	76.9%	82.8%	84.2%	100.0%	84.0%
	School District ED Concentration				Total
	<30.0%	30.0-49.9%	50.0-69.9%	70%+	
All School Districts	106	227	131	35	499
Surveyed Districts	11	40	37	12	100
Sample Rate	10.4%	17.6%	28.2%	34.3%	20.0%
Responding Districts	9	34	29	12	84
Response Rate	81.8%	85.0%	78.4%	100.0%	84.0%
Charter Schools					
All Charter Schools	180				
Surveyed Charter Schools	25				
Sample Rate	13.9%				
Responding Charter Schools	11				
Response Rate	44.0%				
Note: ED represents economically disadvantaged students.					

## Part II – Cost Multiplier Estimates

The tables that follow tabulate all survey responses across the four SPP groups. The first four questions that seek information regarding cost multipliers also provide separate tabulations based on ED or EL student concentration. Other questions in the section request information that pertain to gifted, charter school and transitioning students.

**Question 1(a): If your average base cost equals 1.0, provide your best estimate of the cost multiplier for a typical ED student who is not also an EL.** (Respondents used a drop-down menu of options that include: 1.00 – 1.19, 1.20 – 1.39, 1.40 – 1.59, 1.60 – 1.79 and 1.80 – 2.00.)

Economically Disadvantaged (ED) Multiplier						
	1.00-1.19	1.20-1.39	1.40-1.59	1.60-1.79	1.80-2.00	No Response
School Districts (SDs)						
90.0%+	8	1	1	0	0	0
80.0% - 89.9%	20	10	8	2	7	1
70.0% - 79.9%	6	2	6	2	0	0
<70.0%	<u>4</u>	<u>1</u>	<u>2</u>	<u>1</u>	<u>2</u>	<u>0</u>
All SDs	38	14	17	5	9	1
Charter Schools	6	0	3	0	2	0
	Median <sup>1</sup>		Average <sup>1</sup>		Wght. Avg. <sup>2</sup>	
SD SPP Scores						
90.0%+	1.10		1.16		1.18	
80.0% - 89.9%	1.30		1.36		1.39	
70.0% - 79.9%	1.40		1.35		1.39	
<70.0%	1.40		1.42		1.44	
All SDs	1.30		1.34		1.42	
SD ED Concentration						
<30.0%	1.10		1.12		1.10	
30.0 - 49.9%	1.30		1.32		1.34	
50.0 - 69.9%	1.40		1.40		1.42	
70.0%+	1.50		1.41		1.45	
All SDs	1.30		1.34		1.42	
Charter Schools	1.10		1.35		1.19	
1 Calculated using the midpoint of the ED multiplier range.						
2 Calculated using number of ED students as the weight and the midpoint of the ED multiplier range.						

**Question 1(b): If the funding level indicated in 1(a) was impacted by the reallocation of state and federal funds, what weight was represented prior to the reallocation?** (Respondents used a drop-down menu of options that include: 1.00 – 1.19, 1.20 – 1.39, 1.40 – 1.59, 1.60 – 1.79 and 1.80 – 2.00.)

Economically Disadvantaged (ED) Alternate Multiplier <sup>1</sup>						
	1.00-1.19	1.20-1.39	1.40-1.59	1.60-1.79	1.80-2.00	No Response
School Districts (SDs)						
90.0%+	8	2	0	0	0	0
80.0% - 89.9%	22	8	11	1	5	1
70.0% - 79.9%	7	3	4	2	0	0
<70.0%	5	1	1	2	1	0
All SDs	42	14	16	5	6	1
Charter Schools	6	1	0	1	3	0
	Median <sup>2</sup>		Average <sup>2</sup>		Wght. Avg. <sup>2,3</sup>	
SD SPP Scores						
90.0%+	1.10		1.14		1.15	
80.0% - 89.9%	1.30		1.33		1.32	
70.0% - 79.9%	1.30		1.31		1.32	
<70.0%	1.20		1.36		1.41	
All SDs	1.10		1.30		1.38	
SD ED Concentration						
<30.0%	1.10		1.10		1.10	
30.0 - 49.9%	1.30		1.31		1.30	
50.0 - 69.9%	1.30		1.34		1.34	
70.0%+	1.30		1.36		1.42	
All SDs	1.10		1.30		1.38	
Charter Schools	1.10		1.39		1.20	

1 For respondents that did not answer this question, it is assumed the multiplier is the same as question 1(a).

2 Calculated using the midpoint of the alternate ED multiplier range.

3 Calculated using number of ED students as the weight.

**Question 2: If your average base cost equals 1.0, provide your best estimate of the cost multiplier for a typical EL student who is not also ED.** (Respondents were not given a drop-down menu of options.)

English Learner (EL) Multiplier							
	1.00-1.19	1.20-1.39	1.40-1.59	1.60-1.79	1.80-1.99	2.00+	No Response <sup>1</sup>
<b>School Districts (SDs)</b>							
90.0%+	2	0	3	1	0	0	4
80.0% - 89.9%	4	7	8	5	0	3	21
70.0% - 79.9%	3	5	2	2	0	0	4
<70.0%	<u>1</u>	<u>2</u>	<u>1</u>	<u>3</u>	<u>1</u>	<u>1</u>	<u>1</u>
<b>All SDs</b>	<b>10</b>	<b>14</b>	<b>14</b>	<b>11</b>	<b>1</b>	<b>4</b>	<b>30</b>
<b>Charter Schools</b>	<b>1</b>	<b>1</b>	<b>3</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>4</b>
	<b>Median<sup>2</sup></b>		<b>Average<sup>2</sup></b>		<b>Wght. Avg.<sup>2,3</sup></b>		
<b>SD SPP Scores</b>							
90.0%+	1.49		1.38		1.41		
80.0% - 89.9%	1.50		1.46		1.41		
70.0% - 79.9%	1.28		1.31		1.47		
<70.0%	1.62		1.72		1.58		
<b>All SDs</b>	<b>1.48</b>		<b>1.46</b>		<b>1.56</b>		
<b>SD EL Concentration</b>							
<1.0%	1.32		1.39		1.39		
1.0% - 4.99%	1.40		1.41		1.31		
5.0%+ <sup>4</sup>	1.50		1.46		1.47		
<b>All SDs</b>	<b>1.48</b>		<b>1.46</b>		<b>1.48</b>		
<b>Charter Schools</b>	<b>1.49</b>		<b>1.47</b>		<b>1.37</b>		

1 All responses of 1.00 (default response on the survey) and districts/schools without any EL students were considered to be a "No Response."

2 Excludes respondents designated as no response.

3 Calculated using number of EL students as the weight.

4 Excludes an outlier response that was more than three standard deviations away from the average/mean response.

**Question 3: If your average base cost equals 1.0, provide your best estimate of the cost multiplier for a typical ED student who is also homeless. Your answer may be the same as question 1, or somewhat higher.** (Respondents were not given a drop-down menu of options, but a few districts used the ranges provided in questions 1a and 1b. In those cases, the midpoint of the range was used.)

Homeless Student Multiplier							
	1.00-1.19	1.20-1.39	1.40-1.59	1.60-1.79	1.80-1.99	2.00+	No Response
<b>School Districts (SDs)</b>							
90.0%+	7	2	0	1	0	0	0
80.0% - 89.9%	18	7	10	4	0	8	1
70.0% - 79.9%	6	3	3	2	1	1	0
<70.0%	<u>3</u>	<u>1</u>	<u>2</u>	<u>1</u>	<u>2</u>	<u>1</u>	<u>0</u>
<b>All SDs</b>	<b>34</b>	<b>13</b>	<b>15</b>	<b>8</b>	<b>3</b>	<b>10</b>	<b>1</b>
<b>Charter Schools</b>	<b>6</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>0</b>
	Median <sup>1</sup>		Average <sup>1</sup>		Wght. Avg. <sup>1,2</sup>		
<b>SD SPP Scores</b>							
90.0%+	1.05		1.18		1.19		
80.0% - 89.9% <sup>3</sup>	1.24		1.40		1.41		
70.0% - 79.9%	1.25		1.38		1.46		
<70.0%	1.50		1.50		1.56		
<b>All SDs</b>	<b>1.25</b>		<b>1.38</b>		<b>1.51</b>		
<b>SD ED Concentration</b>							
<30.0%	1.05		1.21		1.19		
30.0 - 49.9% <sup>3</sup>	1.23		1.37		1.38		
50.0 - 69.9%	1.25		1.40		1.44		
70.0%+	1.50		1.48		1.57		
<b>All SDs</b>	<b>1.25</b>		<b>1.38</b>		<b>1.51</b>		
<b>Charter Schools</b>	<b>1.10</b>		<b>1.35</b>		<b>1.18</b>		
1 Excludes respondents who did not answer question.							
2 Calculated using number of ED students as the weight.							
3 Excludes an outlier response that was more than three standard deviations away from the average/mean response.							

**Question 4: If your average base cost equals 1.0, provide your best estimate of the cost multiplier for a typical ED student who is also in foster care. Your answer may be the same as question 1, or somewhat higher.** (Respondents were not given a drop-down menu of options, but a few districts used the ranges provided in questions 1a and 1b. In those cases, the midpoint of the range was used.)

Students in Foster Care Multiplier							
	1.00-1.19	1.20-1.39	1.40-1.59	1.60-1.79	1.80-1.99	2.00+	No Response
<b>School Districts (SDs)</b>							
90.0%+	7	1	2	0	0	0	0
80.0% - 89.9%	20	6	8	4	1	8	1
70.0% - 79.9%	5	3	3	2	1	2	0
<70.0%	3	1	2	2	1	1	0
<b>All SDs</b>	<b>35</b>	<b>11</b>	<b>15</b>	<b>8</b>	<b>3</b>	<b>11</b>	<b>1</b>
<b>Charter Schools</b>	<b>7</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>0</b>
	Median <sup>1</sup>		Average <sup>1</sup>		Wght. Avg. <sup>1,2</sup>		
<b>SD SPP Scores</b>							
90.0%+	1.05		1.17		1.16		
80.0% - 89.9% <sup>3</sup>	1.20		1.40		1.43		
70.0% - 79.9%	1.43		1.44		1.53		
<70.0%	1.50		1.49		1.56		
<b>All SDs</b>	<b>1.25</b>		<b>1.39</b>		<b>1.52</b>		
<b>SD ED Concentration</b>							
<30.0%	1.05		1.12		1.08		
30.0 - 49.9% <sup>3</sup>	1.20		1.38		1.37		
50.0 - 69.9%	1.30		1.43		1.49		
70.0%+	1.50		1.51		1.57		
<b>All SDs</b>	<b>1.25</b>		<b>1.39</b>		<b>1.52</b>		
<b>Charter Schools</b>	<b>1.10</b>		<b>1.35</b>		<b>1.20</b>		
1 Excludes respondents who did not answer question.							
2 Calculated using number of ED students as the weight.							
3 Excludes an outlier response that was more than three standard deviations away from the average/mean response.							

**Question 5: If your average base cost equals 1.0, provide your best estimate of the cost multiplier for a typical student who is gifted. Expenses for gifted students include those listed under Accounting Code 1243, but could include other expenses as well.** (Respondents were not given a drop-down menu of options, but a few districts used the ranges provided in questions 1a and 1b. In those cases, the midpoint of the range was used.)

Gifted Student Multiplier							
	1.00-1.19	1.20-1.39	1.40-1.59	1.60-1.79	1.80-1.99	2.00+	No Response
<b>School Districts (SDs)</b>							
90.0%+	7	1	1	0	1	0	0
80.0% - 89.9%	23	16	4	0	1	3	1
70.0% - 79.9%	7	6	3	0	0	0	0
<70.0%	<u>5</u>	<u>2</u>	<u>2</u>	<u>0</u>	<u>0</u>	<u>1</u>	<u>0</u>
<b>All SDs</b>	<b>42</b>	<b>25</b>	<b>10</b>	<b>0</b>	<b>2</b>	<b>4</b>	<b>1</b>
<b>Charter Schools</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>4</b>
	Median <sup>1</sup>		Average <sup>1</sup>		Wght. Avg. <sup>1,2</sup>		
<b>SD SPP Scores</b>							
90.0%+	1.03		1.16		1.09		
80.0% - 89.9% <sup>3</sup>	1.20		1.24		1.25		
70.0% - 79.9%	1.20		1.21		1.24		
<70.0%	1.20		1.31		1.24		
<b>All SDs</b>	<b>1.19</b>		<b>1.23</b>		<b>1.22</b>		
<b>SD ED Concentration</b>							
<30.0%	1.02		1.10		1.05		
30.0 - 49.9% <sup>3</sup>	1.20		1.23		1.21		
50.0 - 69.9% <sup>3</sup>	1.20		1.29		1.51		
70.0%+	1.15		1.20		1.14		
<b>All SDs</b>	<b>1.19</b>		<b>1.23</b>		<b>1.22</b>		
<b>Charter Schools</b>	<b>1.00</b>		<b>1.11</b>		<b>1.12</b>		
1 Excludes respondents who did not answer question.							
2 Calculated using number of ADM students as the weight.							
3 Excludes an outlier response that was more than three standard deviations away from the average/mean response.							



**Question 6 (school districts only):** Student departures to charter schools may imply additional costs or savings for certain school districts. For example, if 10% of your student base departs to a charter school, then the average cost to educate students that remain might increase by a small percentage due to smaller class size or other technical factors. If your average base cost equals 1.0, provide a rough approximation of the cost multiplier to apply to the average student cost if such a hypothetical scenario occurred proportionally across all grades. Be sure to factor in the additional charter school tuition cost. For example, a response of 1.02 would imply that the average cost to educate remaining students would increase by 2%. It is also possible that the cost multiplier could be 1.0, or possibly less than 1.0. (Respondents were not given a drop-down menu of options, but a few districts used the ranges provided in questions 1a and 1b. In those cases, the midpoint of the range was used.)

Note: This question attempts to quantify the increase in the base cost to educate remaining students due to students who depart for charter schools. The base cost may increase due to (1) stranded costs (e.g., the same number of teachers are needed and class sizes are reduced, hence the cost is spread over fewer students) and (2) charter school tuition costs for students who leave the district (increases the instructional costs to be spread over the same number of students).

Student Departure Multiplier							
	1.00-1.04	1.05-1.09	1.10-1.19	1.20-1.29	1.30-1.39	1.40+	No Response
School Districts (SDs)							
90.0%+	5	1	2	2	0	0	0
80.0% - 89.9%	9	7	9	3	4	15	1
70.0% - 79.9%	1	4	4	2	2	3	0
<70.0%	1	1	3	0	1	4	0
All SDs	16	13	18	7	7	22	1

	Median <sup>1</sup>	Average <sup>1</sup>	Wght. Avg. <sup>1,2</sup>
SD SPP Scores			
90.0%+	1.06	1.08	1.07
80.0% - 89.9% <sup>3</sup>	1.14	1.28	1.28
70.0% - 79.9% <sup>3</sup>	1.15	1.20	1.17
<70.0%	1.26	1.41	1.27
All SDs	1.11	1.26	1.24

1 Excludes respondents who did not answer question.

2 Calculated using number of ADM students as the weight.

3 Excludes an outlier response that was more than three standard deviations away from the average/mean response.

**Question 7 (Question 6 for charter schools): Student transition and unexpected enrollments may imply additional costs related to assessment testing, remediation and other factors. Provide your best dollar estimate of the additional costs for a new student who enrolls mid-year (e.g., \$300 per new student). If possible, provide your best estimate for the share of new students that enroll during the school year, relative to those present to start the school year. (Respondents were not given a drop-down menu of options.)**

Transition Costs per New Student							
	\$0	\$1- \$249	\$250- \$499	\$500- \$999	\$1,000- \$1,999	\$2,000+	No Response
School Districts (SDs)							
90.0%+	2	3	2	2	0	0	1
80.0% - 89.9%	1	6	16	14	5	1	5
70.0% - 79.9%	1	3	3	3	3	2	1
<70.0%	0	1	0	4	2	3	0
All SDs	4	13	21	23	10	6	7
Charter Schools	3	0	1	3	1	1	2
	Median <sup>1</sup>	Average <sup>1</sup>	Wght. Avg. (New Students) <sup>1,2</sup>		Wght. Avg. (ADM) <sup>1,3</sup>		
SD SPP Scores							
90.0%+	\$200	\$222	\$269		\$209		
80.0% - 89.9% <sup>4</sup>	\$429	\$508	\$724		\$618		
70.0% - 79.9% <sup>4</sup>	\$450	\$651	\$849		\$812		
<70.0%	\$875	\$1,819	\$1,235		\$867		
All SDs	\$500	\$680	\$1,052		\$741		
Charter Schools <sup>4</sup>	\$438	\$409	\$780		\$362		
1 Excludes respondents who did not answer question or indicated they had no student enrollments during the year.							
2 Calculated using number of new students during the year as the weight.							
3 Calculated using ADM as the weight.							
4 Excludes an outlier response that was more than three standard deviations away from the average/mean response.							

Share of New Students Arriving During School Year							
	<5.0%	5.0% - 7.4%	7.5%- 9.9%	10.0%- 19.9%	20.0%- 29.9%	30.0%+	No Response
<b>School Districts (SDs)</b>							
90.0% +	7	1	1	1	0	0	0
80.0% - 89.9%	20	11	4	7	1	1	4
70.0% - 79.9%	3	5	2	4	1	1	0
<70.0%	<u>1</u>	<u>1</u>	<u>4</u>	<u>3</u>	<u>1</u>	<u>0</u>	<u>0</u>
<b>All SDs</b>	<b>31</b>	<b>18</b>	<b>11</b>	<b>15</b>	<b>3</b>	<b>2</b>	<b>4</b>
<b>Charter Schools</b>	<b>6</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>1</b>
	<b>Median<sup>1</sup></b>		<b>Average<sup>1</sup></b>		<b>Wght. Avg.<sup>1,2</sup></b>		
<b>SD SPP Scores</b>							
90.0% +	2.4%		4.3%		4.8%		
80.0% - 89.9% <sup>3</sup>	5.0%		5.3%		5.7%		
70.0% - 79.9%	7.5%		9.3%		9.2%		
<70.0%	8.0%		10.7%		7.5%		
<b>All SDs</b>	<b>5.0%</b>		<b>6.7%</b>		<b>6.9%</b>		
<b>Charter Schools</b>	<b>2.5%</b>		<b>6.0%</b>		<b>18.2%</b>		
1 Excludes respondents who did not answer question.							
2 Calculated using ADM as the weight.							
3 Excludes an outlier response that was more than three standard deviations away from the average/mean response.							

### Part III – Best Practices

Please attempt to quantify how intensively the following practices, programs or activities were used by your school district/charter school for the 2021-22 school year and the approximate share of students that participated in the programs or activities (if applicable). Use a scale that ranges from 0-3 (0 denotes N/A; 1 denotes minimal use; 2 denotes moderate use; and 3 denotes extensive use).

Note: While many districts were able to provide the percentage of students participating, some districts noted that they were rough approximations. The percentage of students participating is not included in these results but can be provided upon request.

Q1: Pre-School and/or K4 Programs for Students Without a Known Disability							
	Intensity of Use				Value		
	NA	Minimal	Moderate	Extensive	Median	Avg.	Wght. Avg.
<b>School Districts (SDs)</b>							
90.0%+	5	1	0	3	0.00	1.11	0.89
80.0% - 89.9%	26	5	8	7	0.00	0.91	0.86
70.0% - 79.9%	7	1	2	5	1.00	1.33	0.70
<70.0%	3	0	2	5	2.50	1.90	1.98
<b>All SDs</b>	<b>41</b>	<b>7</b>	<b>12</b>	<b>20</b>	<b>0.00</b>	<b>1.14</b>	<b>1.50</b>
<b>Charter Schools</b>	<b>9</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0.00</b>	<b>0.55</b>	<b>0.13</b>
Notes: For median, average and weighted average values, 0 = NA, 1 = minimal, 2 = moderate and 3 = extensive intensity of use. Weighted average uses ADM as weight. Data groups exclude some school districts due to no response: 90.0% (1 district), 80.0% - 89.9% (2 districts), 70.0% - 79.9% (1 district).							

Q2: Monitoring of Individual Student Achievement							
	Intensity of Use				Value		
	NA	Minimal	Moderate	Extensive	Median	Avg.	Wght. Avg.
<b>School Districts (SDs)</b>							
90.0%+	0	0	1	9	3.00	2.90	2.89
80.0% - 89.9%	0	3	9	35	3.00	2.68	2.81
70.0% - 79.9%	0	1	1	13	3.00	2.80	2.88
<70.0%	0	0	1	9	3.00	2.90	2.96
<b>All SDs</b>	<b>0</b>	<b>4</b>	<b>12</b>	<b>66</b>	<b>3.00</b>	<b>2.76</b>	<b>2.91</b>
<b>Charter Schools</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>9</b>	<b>3.00</b>	<b>2.73</b>	<b>2.94</b>
Notes: For median, average and weighted average values, 0 = NA, 1 = minimal, 2 = moderate and 3 = extensive intensity of use. Weighted average uses ADM as weight. Data groups exclude some school districts due to no response: 80.0% - 89.9% (1 district), 70.0% - 79.9% (1 district).							

### Q3: Parent and Community Involvement

	Intensity of Use				Value		
	NA	Minimal	Moderate	Extensive	Median	Avg.	Wght. Avg.
<b>School Districts (SDs)</b>							
90.0%+	0	2	5	3	2.00	2.10	2.13
80.0% - 89.9%	0	14	23	10	2.00	1.91	2.06
70.0% - 79.9%	0	3	8	4	2.00	2.07	2.21
<70.0%	0	1	7	2	2.00	2.10	1.48
<b>All SDs</b>	<b>0</b>	<b>20</b>	<b>43</b>	<b>19</b>	<b>2.00</b>	<b>1.99</b>	<b>1.75</b>
<b>Charter Schools</b>	<b>0</b>	<b>5</b>	<b>5</b>	<b>1</b>	<b>2.00</b>	<b>1.64</b>	<b>2.47</b>

Notes: For median, average and weighted average values, 0 = NA, 1 = minimal, 2 = moderate and 3 = extensive intensity of use. Weighted average uses ADM as weight. Data groups exclude some school districts due to no response: 80.0% - 89.9% (1 district), 70.0% - 79.9% (1 district).

### Q4: Student Participation in After-School Activities

	Intensity of Use				Value		
	NA	Minimal	Moderate	Extensive	Median	Avg.	Wght. Avg.
<b>School Districts (SDs)</b>							
90.0%+	0	0	7	3	2.00	2.30	2.41
80.0% - 89.9%	0	3	22	22	2.00	2.40	2.49
70.0% - 79.9%	0	2	6	8	2.50	2.38	2.21
<70.0%	0	0	5	5	2.50	2.50	2.19
<b>All SDs</b>	<b>0</b>	<b>5</b>	<b>40</b>	<b>38</b>	<b>2.00</b>	<b>2.40</b>	<b>2.29</b>
<b>Charter Schools</b>	<b>2</b>	<b>2</b>	<b>6</b>	<b>1</b>	<b>2.00</b>	<b>1.55</b>	<b>1.90</b>

Notes: For median, average and weighted average values, 0 = NA, 1 = minimal, 2 = moderate and 3 = extensive intensity of use. Weighted average uses ADM as weight. Data groups exclude some school districts due to no response: 80.0% - 89.9% (1 district).

### Q5: Student Participation in School-Sponsored Tutoring

	Intensity of Use				Value		
	NA	Minimal	Moderate	Extensive	Median	Avg.	Wght. Avg.
<b>School Districts (SDs)</b>							
90.0%+	0	3	6	1	2.00	1.80	1.71
80.0% - 89.9%	2	17	21	7	2.00	1.70	1.80
70.0% - 79.9%	0	8	2	5	1.00	1.80	1.39
<70.0%	0	4	2	4	2.00	2.00	1.39
<b>All SDs</b>	<b>2</b>	<b>32</b>	<b>31</b>	<b>17</b>	<b>2.00</b>	<b>1.77</b>	<b>1.53</b>
<b>Charter Schools</b>	<b>4</b>	<b>2</b>	<b>3</b>	<b>2</b>	<b>1.00</b>	<b>1.27</b>	<b>2.32</b>

Notes: For median, average and weighted average values, 0 = NA, 1 = minimal, 2 = moderate and 3 = extensive intensity of use. Weighted average uses ADM as weight. Data groups exclude some school districts due to no response: 80.0% - 89.9% (1 district) and 70.0% - 79.9% (1 district).

### Q6: Aide/Para-Professional Work in the Classroom to Assist Teachers

	Intensity of Use				Value		
	NA	Minimal	Moderate	Extensive	Median	Avg.	Wght. Avg.
<b>School Districts (SDs)</b>							
90.0%+	1	1	3	5	2.50	2.20	2.32
80.0% - 89.9%	0	2	13	32	3.00	2.64	2.58
70.0% - 79.9%	1	1	3	11	3.00	2.50	1.88
<70.0%	0	3	3	4	2.00	2.10	1.43
<b>All SDs</b>	<b>2</b>	<b>7</b>	<b>22</b>	<b>52</b>	<b>3.00</b>	<b>2.49</b>	<b>1.84</b>
<b>Charter Schools</b>	<b>2</b>	<b>3</b>	<b>2</b>	<b>4</b>	<b>2.00</b>	<b>1.73</b>	<b>0.64</b>

Notes: For median, average and weighted average values, 0 = NA, 1 = minimal, 2 = moderate and 3 = extensive intensity of use. Weighted average uses ADM as weight. Data groups exclude some school districts due to no response: 80.0% - 89.9% (1 district).



**Q7: Other best practices your district uses to assist ED or EL students.**

Many districts and charter schools listed different items for this question. The table below contains a list of practices noted by districts and charter schools on best practices they use to assist ED or EL students.

<b>Other Best Practices Used to Assist ED or EL Students Noted by Survey Respondents</b>	
<b>School Districts - SPP 90.0%+</b> <ul style="list-style-type: none"> <li>- Classroom support</li> <li>- Cultural navigation, professional development</li> <li>- ELD assistants and parent workshops</li> <li>- Interpreting services</li> <li>- Individualized English Language Learner plans</li> <li>- Cares closet</li> <li>- Holiday shop</li> <li>- MTSS</li> </ul>	<b>School Districts - SPP 70.0 - 79.9%</b> <ul style="list-style-type: none"> <li>- Schoolwide Title I</li> <li>- MTSS</li> <li>- ED Backpack Prog. (food sent home over weekend)</li> <li>- Student Assistance Program</li> <li>- EL Summer School Program</li> <li>- Extended School Year</li> <li>- EL interpretation services for students &amp; families</li> <li>- Transition Education</li> </ul>
<b>School Districts - SPP 80.0 - 89.9%</b> <ul style="list-style-type: none"> <li>- Summer Programming for ED, EL &amp; base students</li> <li>- Padres/Latino meetings (100+ participants)</li> <li>- Title I Services</li> <li>- Preview grade level content. Reteach prerequisite skills as needed</li> <li>- Positive Behavioral Intervention Support</li> <li>- Additional Counseling Services</li> <li>- Community Eligibility Program (all kids eat free)</li> <li>- Instructional Shifts</li> <li>- SAP, Alternative Ed, Summer Lunch Program</li> <li>- Extended School Year</li> <li>- Instructional Coaches and MTSS</li> <li>- Saturday Superstars, Summer Learning Lab</li> <li>- Strengthening Families</li> <li>- In-house ELL teachers (2)</li> <li>- Transportation/counseling for homeless and foster</li> <li>- Instructional Materials and Digital Platforms</li> <li>- Summer ESL Program</li> <li>- Social Work Services</li> <li>- Summer Food Service Program and Food Service Truck Delivery</li> <li>- Life Ready Graduate Implementation</li> <li>- Panther Pantry</li> <li>- Motherhood Initiatives, Fatherhood Initiatives, Stem &amp; Vine ASP</li> <li>- Hired 3 social workers</li> <li>- HOMES program</li> <li>- Utilize SHINE Program in elementary school</li> <li>- Food Service Assistance</li> </ul>	<b>School Districts - SPP &lt;70%</b> <ul style="list-style-type: none"> <li>- Interventionist Program</li> <li>- Small group instruction</li> <li>- Dual Language Programs</li> <li>- On-demand translation and transcription services</li> <li>- Implemented a Welcome Center for New Comers</li> <li>- Translators, Parent Liaisons, MTSS Positions &amp; Bilingual Psychologists</li> <li>- Bilingual Paraprofessionals</li> <li>- Additional Social Workers</li> <li>- Summer and Extended Day Programming</li> <li>- Newcomer Learning Academy</li> <li>- Summer enrichment programming</li> <li>- Bilingual Office Aides &amp; Welcome Center</li> </ul>
	<b>Charter Schools</b> <ul style="list-style-type: none"> <li>- Collaboration with community services</li> <li>- Career Readiness</li> <li>- Saturday School</li> <li>- EL Student best practices</li> <li>- Progress Monitoring</li> <li>- Social Work &amp; mental health services</li> <li>- Push-in by EL teacher and support teachers in EL classrooms</li> <li>- Certified Instructional Support teacher to provide Tier II support</li> <li>- Translation services</li> <li>- Family Services</li> <li>- Before School Prep</li> <li>- Safety/Security services</li> </ul>

**Question 8: If your district/school operates a school-based community center(s) for after school group activities, social support, public information or other purposes, provide your best estimate of the annual cost to operate the center(s) on a per student basis.** (Respondents were not given a drop-down menu of options.)

Note: Since few surveyed districts and charters have community centers, only a tabulation of the cost per student for the community centers was completed. Additional detail can be provided upon request.

Community Center Costs per Student							
	\$1- \$99	\$100- \$199	\$200- \$299	\$300- \$999	\$1,000- \$1,999	\$2,000+	\$0/ No Response
<b>School Districts (SDs)</b>							
90.0%+	0	1	0	0	0	0	9
80.0% - 89.9%	0	1	1	0	0	2	44
70.0% - 79.9%	0	1	0	0	1	0	14
<70.0%	0	0	1	2	1	2	4
<b>All SDs</b>	<b>0</b>	<b>3</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>4</b>	<b>71</b>
<b>Charter Schools</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>10</b>

**Question 9: If your school district employs crossing guards to ensure the safe passage of students to and from school, please provide the annual cost to provide those services. If crossing guard services are provided by a municipal government, please provide the municipal government cost, if possible. Do not include any costs related to special events or after school activities.** (Respondents were not given a drop-down menu of options.)

Note: In some cases, a district covers all costs, while in other cases a municipality shares costs with the districts. In a few cases, a municipality paid the full cost of crossing guards. Overall, roughly one-third of the cost of crossing guards is paid by a municipality and two-thirds by a district. The table reflects total crossing guard expenses.

Total Crossing Guard Expenses Paid by District/Charter School and Municipality						
	\$1- \$24,999	\$25,000- \$49,999	\$50,000- \$99,999	\$100,000- \$149,999	\$150,000+	No Response or \$0
<b>School Districts (SDs)</b>						
90.0%+	3	2	0	1	1	3
80.0% - 89.9%	9	3	6	3	1	26
70.0% - 79.9%	5	1	0	1	1	8
<70.0%	0	0	2	0	6	2
<b>All SDs</b>	<b>17</b>	<b>6</b>	<b>8</b>	<b>5</b>	<b>9</b>	<b>39</b>
<b>Charter Schools</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>11</b>



Crossing Guard Expenses per ADM (for Districts with Crossing Guards)						
	<\$5	\$5-\$9.99	\$10-\$19.99	\$20-\$49.99	\$50+	\$0/No Response
School Districts (SDs)						
90.0%+	3	1	3	0	0	3
80.0% - 89.9%	5	5	4	6	2	26
70.0% - 79.9%	3	1	2	1	1	8
<70.0%	2	0	0	5	1	2
All SDs	13	7	9	12	4	39
Charter Schools	0	0	0	0	0	11
	Median <sup>1</sup>		Average <sup>1</sup>		Wght. Avg. <sup>2</sup>	
SD SPP Scores						
90.0%+	\$6.67		\$7.71		\$7.67	
80.0% - 89.9% <sup>3</sup>	\$10.16		\$15.82		\$17.35	
70.0% - 79.9%	\$8.28		\$16.49		\$21.62	
<70.0%	\$27.42		\$31.44		\$9.89	
All SDs	\$10.89		\$17.49		\$11.65	
Charter Schools	NA		NA		NA	
1 Includes only districts and charter schools that reported non-zero crossing guard expenses (paid for by the district, charter school or municipality).						
2 Calculated using ADM as the weight.						
3 Excludes an outlier response that was more than three standard deviations away from the average/mean response.						

## Part IV – Facility Assessments

This section contains questions regarding facility assessments that were not included in the 2015 survey.

**Question 1: How frequently do you routinely conduct a district-wide/charter school-wide facilities assessment that includes projected district maintenance needs, infrastructure upgrade needs, and other facilities' needs?** (Respondents were given a drop-down menu of options that include: annually, alternate years, every 3-5 years, every 5+ years, and every 10+ years.)

Frequency of District/School-Wide Facility Assessments						
	Annually	Every Other Year	3-5 Years	5+ Years	10+ Years	Other <sup>1</sup>
<b>School Districts (SDs)</b>						
90.0%+	2	0	4	2	2	0
80.0% - 89.9%	28	3	11	3	3	0
70.0% - 79.9%	8	0	2	2	4	0
<70.0%	<u>5</u>	<u>0</u>	<u>3</u>	<u>2</u>	<u>0</u>	<u>0</u>
<b>All SDs</b>	<b>43</b>	<b>3</b>	<b>20</b>	<b>9</b>	<b>9</b>	<b>0</b>
<b>Charter Schools</b>	<b>7</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>1</b>

<sup>1</sup> Has not completed a school wide facilities assessment.

**Question 2: If yes to question 1, who is involved in this routine assessment?** (Respondents were given a drop-down menu of options that include: engineering, architectural, or other professional firm/consultant; district staff/charter school staff; combination of district/charter school staff and engineering/architectural/other professional firm/consultant; answered "no" to question 1.)

Type of District/School-Wide Facility Assessment				
	District/School Staff	Professional Firm/Consultant	District/School Staff & Prof. Firm/Consultant	Other <sup>1</sup>
<b>School Districts (SDs)</b>				
90.0%+	1	3	6	0
80.0% - 89.9%	23	3	22	0
70.0% - 79.9%	5	2	8	1
<70.0%	<u>1</u>	<u>0</u>	<u>9</u>	<u>0</u>
<b>All SDs</b>	<b>30</b>	<b>8</b>	<b>45</b>	<b>1</b>
<b>Charter Schools</b>	<b>4</b>	<b>0</b>	<b>6</b>	<b>1</b>

<sup>1</sup> Has not completed a school wide facilities assessment or did not answer the question.

**Question 3: In what year did you last conduct a formal (professionally contracted) system wide (all school/LEA buildings) facilities assessment?** (Respondents were given a drop-down of years from 1980 through 2023 and prior to 1980.)

Latest Year of a Professionally-Contracted, System Wide (All Buildings) Assessment						
	2022 or 2023	2020 or 2021	2015 to 2019	2010 to 2014	Prior to 2010	No Response
<b>School Districts (SDs)</b>						
90.0%+	5	1	3	1	0	0
80.0% - 89.9%	11	9	12	6	7	3
70.0% - 79.9%	4	1	4	4	1	2
<70.0%	4	1	4	0	1	0
<b>All SDs</b>	<b>24</b>	<b>12</b>	<b>23</b>	<b>11</b>	<b>9</b>	<b>5</b>
<b>Charter Schools</b>	<b>5</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>3</b>

**Question 4: In what year did you last conduct a formal (professionally contracted) individual school site or individual building facilities assessment?** (Respondents were given a drop-down of years from 1980 through 2023 and prior to 1980.)

Latest Year of a Professionally-Contracted, Individual Building Assessment						
	2022 or 2023	2020 or 2021	2015 to 2019	2010 to 2014	Prior to 2010	No Response
<b>School Districts (SDs)</b>						
90.0%+	8	0	1	1	0	0
80.0% - 89.9%	19	11	8	5	4	1
70.0% - 79.9%	6	3	4	2	0	1
<70.0%	7	0	2	0	1	0
<b>All SDs</b>	<b>40</b>	<b>14</b>	<b>15</b>	<b>8</b>	<b>5</b>	<b>2</b>
<b>Charter Schools</b>	<b>5</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>3</b>

## **Part V: General Survey Comments**

Survey respondents were instructed to provide comments or additional information that may be pertinent to the survey. All responses are shown as submitted.

### **Allentown City SD**

Very hard to assess and estimate numbers in a district like Allentown. Most students are very needy and they have an unusually high % of students that are ELL. In fact Allentown has 2 schools dedicated to students who are severely ELL (barely speak English).

### **Altoona Area SD**

Significant costs related to the support of ED and EL students are found in function codes outside of the 1100 series (but are included in the PDE 363 calculation). The multiplier above incorporates expenditures related to school psychologists, social workers, administrative support, nursing, building security and tuition to career and technology centers. Additionally, in a community with low property values and low average income levels the reducing factor of the Local Effort Capacity Index has negative effect on the distribution of BEF to communities in need.

### **Avon Grove SD**

Part II-First Section-Line 2 Code 1100 costs include ESSR & Title expenses = \$2,298,306 - Part II - Item #7, Student Transitions - Additional Cost per student would depend if the newly enrolled required special services. Student Departure to Charter School - If 50 students were to transfer to charter school, the additional expense would be all tuition, and increase of approx. 2% to those students that remained. If 500 students transferred the additional tuition expense would be significant with some reduction in staff costs, estimated increase of approx. 18% to those students that remained.

### **Blue Ridge SD**

The Blue Ridge School District struggles financially in its efforts to fund rising special education costs, charter school funding and aging facilities. Our region is a low-income rural county with limited opportunities for families. We are in need of a greater state investment for our children to learn and thrive.

### **Bradford Area SD**

The Bradford Area School District has not had a Business Manager for the past 60 days. We are uncomfortable estimating the multipliers without extensive analysis. We have given our best estimates.

### **Chambersburg Area SD**

We continue to see an increase in enrollment of high needs students and ELL, requiring additional supports to include one-one PCAs, individualized transportation, OT/PT and Speech. We are experiencing dramatic increases to our special education expense. We currently have 26 Autistic support classrooms. Each classroom can serve a maximum of 8 students. We employ 1 teacher and 2 classroom aides for each classroom. Our ELL population is also growing with an additional 120 students over a 2-year period. The weight of these populations must be addressed in the formula.

#### **Clearfield Area SD**

Our multiplier's are lower due to the fact that our ED group is in the range of 60-70% of our student population. As a result our cost per student already reflects what we do for all students regardless of ED status. The programs apply to all students.

#### **Corry Area SD**

We are in the midst of a middle high school renovation. This school hadn't been renovated since the 1990's. The renovation includes roof, HVAC, lighting, ceiling tiles, new front office renovation and several bathrooms.

#### **Dubois Area SD**

DASD was able to slide into Plan Con during the 2019 lapse in the moratorium. Consequently, we were able to start renovation on two of our elementary schools that we would not have undertaken without the Plan Con reimbursement.

#### **East Stroudsburg Area SD**

We have a district hired engineering consultant who consults with us on individual needs but does not do "District wide" facilities assessment. The last one that was done was back in 2010 here.

#### **Erie City SD**

The District tries to utilize the best practices listed above for as many students as possible, however, the resources the District has does not allow for extensive use. Our limited resources only permits us to implement many of the best practice, student support services which are greatly needed by our most challenging students. Additional financial support through the Fair Funding formula would allow us to increase student supports, best practices as well as level the play field for all of our students. The influx of Federal COVID relief dollars allowed us to bring in some of those supports, however, with those dollars not being reoccurring and coming to an end very soon, we are fearful that those programs which we implemented will have to be taken away from our high ED population.

#### **Forest City Regional SD**

I am a brand new superintendent to the school district. Many of the questions on facilities will be part of my plan to establish. I cannot answer them based on my current knowledge of the district.

#### **Fort LeBoeuf SD**

Just to note: in 2021-2022, the Fort LeBoeuf school district used \$1,063,794 of ESSER/COVID related funding in the Instructional Costs function (Part II, column a). The District is also currently preparing for a district wide feasibility study. (Part IV Q3)

#### **Girard SD**

The district is about 60% ED, tax base is made of mostly residential, and the average assessed value of a home is a little over \$100,000. The district is very dependent on state revenue as it makes up about 57% and local being 39%. With our district being very poor it is hard to keep raising the taxes to meet shortfalls and to keep up with all the demands of having such a high economically disadvantaged percentage. With



normal costs going up each year and especially higher after covid, the district faces a battle of keeping classroom size at a level that students will be able to learn and engage while also looking at our facilities on what work needs to be done from roofing to HVAC. The School District has a community school at the elementary that is funded by our local United Way for the director and other resources. This too has been seeing decline in allocation which if it goes away will be difficult to fill due to the resources that the program has brought to the school.

### **Hazleton Area SD**

The Hazleton Area School District, which encompasses 256 square miles, serves students from a cross representation of urban, rural, and suburban communities. The District encompasses 16 municipalities. Most of the District is located in Luzerne County; however, portions of the radius include Carbon and Schuylkill Counties.

The Hazleton Area School District, among the top 10 largest school districts in PA, is comprised of 16 school buildings. The organizational structure includes six (6) K-8 elementary/middle schools, two (2) 3-8 elementary/middle schools, two (2) K-2 elementary schools. The high school students (grades 9-12) are served by four (4) buildings that include the Hazleton Area Academy of Science, the Hazleton Area High School, the Hazleton Area Arts and Humanities Academy, and the Hazleton Area Career Center, which is the District's own Career and Technical Center. The Hazleton Area School District operates a K-12 Cyber Academy that is uniquely designed and housed at our local mall. The Hazleton Area School District operates the Luzerne/Wyoming counties early intervention programs. Hazleton Area School District also educates Pre-Kindergarten students. Our Early Intervention and Pre-K students are located in The Academy near our Arthur Street Elementary School. Hazleton Area also operates a Newcomer Center for our K-6 students. Our Newcomer 7-12 students are serviced in our other schools.

Our student population has grown in both diversity and numbers over the last several years. In 2018-2019, the District's population was approximately 11,500 students with a minority population of 54% Latinx. For the 2023-2024 school year, our student population is in excess of 13,200 students with a minority population is approximately 64% Latinx. In the last year, alone, the District increased its ELL population from 2,600 to 3,400. To meet the needs of our children, we have an ELL staff of 53 certified teachers at a cost of \$4.5 million annually. All of our schools have bilingual liaisons and bilingual paraprofessionals to assist our students and parents as well. We continue to enroll new students every day. New enrollments continue throughout the school year. The District employs approximately 1600 people. We are one of the largest employers in the area.

Although Spanish accounts for the largest percentage of languages spoken in the District buildings, there are a total of 22 different languages across our schools. The special education population was approximately 12.8% in 2018-2019 school year. The special education population in 2023-2024 is about 15%. Due to our Community Eligibility Provision (CEP) percentage, all of our students receive free breakfast and lunch.

We have addressed the increasing population through creatively renovating spaces within our existing schools. For example, we closed four (4) pools located in four (4) of our elementary/middle schools to create classroom space. Additionally, we remodeled our existing libraries in most of our schools to provide additional classroom spaces. With those projects, we were able to secure 34 classrooms for \$10 million. We purchased and renovated two (2) buildings recently. They now house our Early Intervention students,

Pre-K students, and Arts and Humanities students. By doing so, we were able to provide more space in our High School, Career Center, and Early Learning Center. By redesigning our Cyber Academy and providing a home in our local mall for those who have chosen to learn online, we increased enrollment from 70 students to over 600 students. This increase in enrollment into our Cyber Academy has allowed for additional space in our other buildings. However, with all of these changes, we are still not able to address the large influx of children we are seeing. As we know, educating children in smaller groups is a better learning environment and can positively impact their academic careers. Our regular education classrooms have large numbers of students in them. Our special education population is increasing which reduces the available space considerably due to the limited number of students permitted in a special needs classroom. For example, we are only permitted, by law, to have eight (8) Autistic Support children in a classroom. We have had to add a number of additional classrooms because of our increased Autism Spectrum Disorder population. As mentioned, this reduces the available space for regular education areas greatly.

The District's budget for the 2023-2024 school year is \$225,512,780.00, which has drastically increased over the last several years to address the needs of our growing student population. Unfortunately, we are not adequately funded to meet all the needs of our children. We are 497 out of 500 school districts for per pupil spending. We are the lowest or next to the lowest tax base in all three counties our District reaches. We do increase taxes, at least, to the index each year. Many families are on fixed incomes or are renting, which makes it difficult to continue to complete our maintenance of effort with our tax increases.

Districts of similar size and demographics receive millions of dollars more than HASD. For example, Lancaster School District received \$77,641,742. They are of similar size and demographic. Reading School District received \$201,949,819. Again, similar size and demographics. HASD received \$64,505,080, which is \$13,136,662 less than Lancaster and \$137,444,739 less than Reading.

Although we have our own Cyber Academy we are still forced to pay for students who attend cyber charter schools. We expend approximately \$6 million on cyber charter tuition each year for about 400 students. With our own Cyber Academy, we are able to minimize the costs associated with its operation. To educate a student in the HACA is approximately \$5,000 per student for roughly 600 students. Basically, we are able to educate more students in our Cyber Academy for much less. We teach students synchronously. We have dedicated special education teachers, psychologist, school counselor, administration, as well as regular education teachers who support all of our students in our Academy.

#### **Jersey Shore Area SD**

The provision of services to students who show up with needs at our doors is not only cost prohibitive, but difficult to find outside of our walls. As a district, we are paying for it and putting that burden on the local taxpayer because there is little support in rural communities to get those services from local and county social service organizations.

#### **Jim Thorpe Area SD**

Since the Superintendent and Business Manager were not working at JTASD during the 2021-22 school year we used 2022-23 information for the Best Practices section.

#### **Lampeter-Strasburg SD**

Our Title I expenses are included in the 1100 total expenditures. This money is used to provide reading and math support.

The "Percentage of Students Participating" in Part III refers to the percentage that participated based on who was able to participate, not on the total student population. For instance, approximately 50% of the students who were offered school-sponsored tutoring participated in tutoring. Likewise, all K4 students without a known disability were included in programs or activities but the K4 students do not make up 100% of our student population.

#### **Lancaster SD**

Please publish the results of this survey to ensure transparency and allow for feedback. Many of my colleagues were not certain of how best to complete the information. I am not certain of how much, if any of the information was used back in 2014/15 to create the formula, so confidence is low in how much of this will actually be taken into consideration. I am happy to discuss this with the commission and any other lawmakers as appropriate.

#### **Mahanoy Area SD**

In Part II, Line 2, an adjustment was made to reduce Instructional Costs by one time federal funds due to ESSERS/ARP ESSER.

#### **Manheim Township SD**

Instructional costs have been reduced by ESSER funds (funding source 990, 994, 996).

#### **Mifflinburg Area SD**

COVID funds were utilized in the instructional expenditures (approx.. \$2.2 mil). The monitoring individual student achievement basis response was in relation to schoolwide positive behavior.

#### **Milton Area SD**

Milton Area School District looks forward to additional state education subsidy payments. Increasing our future revenues and making them more predictable will serve our students and community immensely. We face pressure from drastically increasing cyber charter costs, declining tax base, and reliance on local revenues that puts the financial future of our district at risk. One of our primary goals is to be the center of our community and offer opportunities for students, families, and taxpayers to all benefit from what our district offers but when funding is inadequate, this is often the first priority to get cut as we always place student academic performance first.

#### **North East SD**

Cyber charter school enrollments are financially devastating to small enrollment districts. We offer virtual synchronous, asynchronous or on site hybrid learning options at a third of the cost of cyber charter schools. Lack of Plancon funding has forced us to use 100% local taxpayer funds for all current and proposed renovations. Some districts are advocating for BEF to fully apply the new formula to 100% of all BEF. That would be a \$1 million swing from state to local funding in one year for NESD. Special education mandates



do not have adequate funding to support costs. Cyber charter schools should use same SEF formula for funding.

#### **North Penn SD**

For Part IV, question 3, the district completed a partial formal facilities assessment (4 buildings). To the best of my knowledge the district has not completed a professionally contracted system wide facilities assessment.

#### **North Star SD**

Our school facilities are in need of renovation. Funding is needed from the State for aging schools to be able to perform necessary renovations. Aging buildings, utilization, and roofs need attention.

#### **Northern Bedford County SD**

\$74,974.67 of instructional expenditures (1100) would have been contributed to ESSER money received in 21/22. Question 6 seems irrelevant, with an enrollment of 845, if 10% departed to charter school we would still have the base population to provide educational services to and our charter tuition cost overall would increase by those students \$956,262.72. Retained students also have an impact on these costs as an educational years of education are provided depending on when they are retained.

#### **Penncrest SD**

We only have one crossing guard through the Boro at one school. The other schools do not need a crossing guard.

#### **Pittsburgh SD**

Since 2017-18, we experienced a 33% growth in our English Language Learner population. The cost multiplier for charter school students shows the need for either charter funding formula reform or the reinstitution of the charter reimbursement subsidy.

#### **Scranton SD**

Part 3 Section 1 - N/A - no Pre-school or K4 in district. Section 2 - 100% benchmark assessments grades 3-10 adjusted to be 61.5% of all grades. Section 3 - SSD participates in School Wide Title 1 where 13 of 16 buildings receive parent and family engagement funding. Number represented above is the percentage of students eligible for title 1 services vs total enrollment (excluding outside cyber / charter) Section 4 - District had 1452 7-12 grade students participating in after school sponsored activities. Section 5 - District had 644 students participating in school sponsored tutoring after school. Section 6 - District has a teacher aid in every K classroom as well as provides 1 FTE or itinerant aides for special educations. Percentage represented above is the FTE ratio of students with aides vs total district enrollment (excluding cyber and charters) Section 9 - District and Municipality split the cost of crossing guards on an annual basis. Amount show is the wages and FICA costs paid by the SSD in calendar year 2022. Part 4 - SSD engaged a firm to do a feasibility study in 2021 and is in the process of updating by EOY 2023.

#### **Sharon City SD**

The ESSER funds provided much needed funding that allowed us to add staff, new curriculum and new technology. The amount of federal assistance in the 1100s increased from \$1 million in 2012-13 to almost

\$2.7 million in 2021-22. Please note that we answered the questions as best we could based on our interpretation. There are other issues to consider such as unfunded mandates, costs associated with implementing new programs and providing support to meet the needs of students coming to school not prepared and behind in their growth and development. The District sees a high transiency rate, which impacts student skill acquisition. Many of which have presented large gaps in learning and mastery. We have experienced an increase in students enrolling with special needs, and are seeing increased costs from COVID and inflation in general. The ESSER funds helped us, but we have huge concerns in how we will maintain needed programming and supports for students when the ESSER funding goes away.

#### **Shikellamy SD**

Part II Question 6 is confusing, so I wanted to explain the basis of our answer. Based on our base cost of \$6,787, our costs increase about 48% from the base cost for a regular education student that leaves for a charter school because now we need to pay north of \$10,000 for that student to the cyber charter school. When paying that \$10k, we aren't reducing or saving \$6,787 of cost from our district expense line. The base costs inherently remains in the system and now a new expense is created due to the student going to cyber school. The cost increase is even larger if it is a special education student because then we are paying \$26,000 per student that departs for a charter school. There are no cost savings for a student that goes to a charter school. The home district is not able to reduce staffing to offset these cost increases unless a large number of students depart in one single grade level or out of the high school alone. For example, we currently have approx. 160 students that attend cyber charter schools at a cost north of \$2 million per year. We could bring all 160 of those students back into our classrooms with minimal cost increase to our current education structure based on the assumption that 160 kids equates to somewhere around 12-15 students per grade level. The state funding cyber charter schools or providing for a greater weight in the formula would provide immediate relief to districts that have larger out of district cyber enrollments.

#### **Shippensburg Area SD**

1. We continue to experience a substantial increase in our ELL students in 22/23 and 23/24 school years
2. Since COVID, student enrollment in external cyber charter schools has remained high
3. Homeless population in the District continues to grow. One reason is due to a homeless shelter established in our school district about 1-2 years ago
4. Received a letter notifying our District of a proposed Low Income Housing to be constructed in our school district.
5. Multi-County SD's (including SASD) is harmed by the current laws governing the equalization of real estate tax millage rates across multiple counties. We lose out on tax growth/tax revenue. This should be a factor/weight in the BEF formula.

#### **Souderton Area SD**

We would respectfully request that the BEFC's funding formula recommendation be based on data that are currently being collected by the Department of Education. Much of the data requested in this survey are not currently being reported. Thank you for the opportunity to participate.

#### **Stroudsburg Area SD**

We do not employ crossing guards. Our armed security personnel conducts traffic control for the schools.

#### **Uniontown Area SD**

Part III, I based % off of total ADM. Part IV, the District does routine examinations of the buildings and inspections from our insurance providers but has been a while since we did a formal assessment. However, we did have formal inspections for safety from the PA State Police on all our buildings in 2023.

#### **Upper Darby SD**

Part II: Instructional Costs were reduced by \$10,502,911, which was all funded by various COVID relief funding. An additional note to consider, the District's "Share of ED students" is currently at 74%.

Part III. 9: Our costs should be much higher, but we were unable to staff all of our budgeted positions throughout the 21-22 school year due to staffing shortages.

#### **Wayne Highlands SD**

It is difficult to judge the effectiveness of the enacted funding formula because of the lack of funding support for the formula. Cyber Charter School tuition is a huge cost driver approaching 5% of our total budget. Spread over 12 grades and 435 square miles our 140 cyber charter school student enrollments does not allow for any reduction in costs. Wayne Highlands is a very rural district that consists of 1 K-2 building, 1 3-5 building, 1 6-8 building, 1 9-12 high school, along with two K-8 buildings in the northern regions of our district that are located at least 25 miles from our main campus. Somehow we do not qualify for the paltry sparsity factor in the current formula! These K-8 Buildings serve students from vast areas but have small enrollments. One building has 145 students and the other has 240 students K-8, on a purely economical basis, because of these small enrollments these buildings should be closed, but we strive to provide the best educational experience (our test scores prove this out) for our students, the bus rides for these students are extreme for any age student but doubly so for elementary students.

#### **West York Area SD**

III #3 is for 2 Elementary Title Building wide-Parent & Family Engagement is required.

#### **York City SD**

Full funding of Basic Education Funding (BEF) would allow equitable and appropriate levels of funding to meet the individual needs of ED, EL, Special Education and General Education students.

#### **York Suburban SD**

Part II adjustments: The district used the October 1 Enrollment PIMS reporting. Total 1100 expenditures do not include COVID dollars.

#### **Yough SD**

Part IV - the district is currently conducting a contracted district-wide feasibility assessment study with the final report to be released in December 2023. The district, with the assistance of the hired Architect, will begin to prioritize projects based on facility needs and costs.

### **Commonwealth Charter Academy CS**

It's important to note that Basic Education Funding (BEF) is only distributed to school districts as one of many sources of revenue. Due to the way public cyber charter schools are funded pursuant to Section 1725-A of the Public School Code (24 PS § 17-1725-A), their inability to raise revenue through local taxes, and the tuition rates determined through the PDE-363 (Funding for Charter Schools, Calculation of Selected Expenditures Per Average Daily Membership), the BEF formula and its components lack the specificity needed to support the unique academic, financial, technological, and facility operations of public cyber charter schools, nor do they capture the needs and characteristics of public cyber charter schools and their students. While the information provided in this survey may inform the BEF Commission's processes, it's important for the Commission to recognize and understand that any financial considerations for public cyber charter schools included in a revised BEF formula would result in a reduced benefit to public cyber charter students due to the operation of the PDE-363. Furthermore, due to the unique operations of public cyber charter schools, the Charter School Law, 24 P.S. § 17-1701-A et seq., requires cyber charter schools to "(1) provide all instructional materials; (2) provide all equipment, including but not limited to, a computer, computer monitor and printer; and (3) provide or reimburse for all technology and services necessary for the on-line delivery of the curriculum instruction. See 24 P.S. § 17-1743-A(e).

### **Discovery CS**

A full scale assessment and appraisal of the Building was performed as done as part of our Bond renewal in April 2022.

### **Lincoln Park Performing Arts CS**

We rent our buildings from another entity, the Lincoln Park Performing Arts Center.

### **Mastery CS-Mann Campus**

The baseline funding that Charter schools receive per pupil in Philadelphia (\$10,786 in SY 2021-22) is not sufficient to meet the needs of students in city, particularly to tackle the challenges noted in this document. With EL needs fully unfunded, all services that are provided for English Language Learners pull funds away from the operating funding of the rest of the school, despite it being a moral and legal necessity. Additionally, substantial facility concerns exist due to the operation of buildings in Philadelphia that are nearly 100 years old and have not been maintained prior to the inception of the charter organization, leading to a position where the school must use significant operation funds to ensure the health and safety of students and staff, beyond that which is feasible. Most challenging, the socioeconomic and environmental factors, such as gun violence and poverty, a tremendous amount of resources have to go towards trauma informed mental health services to support the social and emotional needs of students, well above what standard funding allows. As such, many Philadelphia charters are faced with a challenge to provide the basic levels of service to students, let alone tackle the necessary remediation steps required to catch up with better funded suburban peers.

### **Souderton CS Collaborative**

Our authorizing district and its board have prioritized keeping tax increases below the threshold for the past 5 years, often only raising taxes 1%. This reality impacts our funding. During the pandemic, the extra funding provided by the state and federal governments were necessary for the safe and productive



reopening of schools in the 2020-2021 school year. We proudly share that our school, offered in-person instruction for our families beginning on 9/5/2020. During the summer of 2020, our teachers worked tirelessly, to learn and hone their use of technologies that would provide students with a similar quality education as they had pre-pandemic. We began 2020 with 67% of our students in-person and by the years end 85% of students had returned to in-person. During this year, the teachers had to find the balance between academic and social emotional learning. We leaned into our SEL team to meet the needs of the students. By 2021-2022 SY, we continued with a focus on social emotional learning and basic skills like executive functioning and socialization. Beyond the additional funds that we and other schools used to rebound from COVID, we believe that charter school funding in Pennsylvania continues to be inequitable due to districts abilities to hold back funds for capital programs and debt.

While the BEC is addressing unequal funding between districts, I appreciate your inclusion of charters in the discussion. An impact that charters experience, and we did recently, is contention with our authorizers. Though we are one of the highest performing schools in the state, we had to seek remedy for our last charter through the courts. While we prevailed, the monies that were spent on legal costs versus going to programming for students, was disheartening. Despite this reality, we have been able to regain losses experienced over the past several challenging years. We would ask that authorizers not place undue financial burdens on charters who are performing because they believe that charters are unnecessary. We ask that the 363 funding formula be reviewed so more taxpayer monies flow to charters, if one is available in their district.

#### **Sylvan Heights Science CS**

Sylvan Heights Science Charter School contracted with our architects to conduct a complete facilities/feasibility assessment in 2019. The results were released January 2020. The School was not able to move forward with recommendations due to COVID-19 interruptions because the School was required to close March 2020. The School is once again in the process of evaluating our School building and is considering moving to a new location based on the results of the current assessment. Also note, that Sylvan Heights Science Charter School experienced disruptions to the School's learning environment which negatively impacted the school's ability to implement programs involving parent and community engagement.

#### **Staff Acknowledgments**

The survey results were compiled by Karen Maynard and Rachel Flaugh. Questions regarding the survey results can be directed to [kmaynard@ifo.state.pa.us](mailto:kmaynard@ifo.state.pa.us).

## Public Comment Submitted to the Commission

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The Commission had a public website that allowed interested individuals and parties to submit comments that were shared with members. All public comment is available on the Commission's website at [BasicEducationFundingCommission.com](http://BasicEducationFundingCommission.com).

Below are all individuals who submitted public comments to the Commission based on the order the comments were received:

Ellen T., Hanover, PA	Denise J., Montoursville, PA
Walter H., Stewartstown, PA	Calvin M., Dunlevy, PA
Holly T., Fleetwood, PA	Kay B., Lehighton, PA
Scott P., Philadelphia, PA	Norton L., Shunk, PA
Kimberly L., Sinking Spring, PA	Bonnie B., Reading, PA
Jeanette T., Lititz, PA	Bonnie B., Reading, PA
Robert K., Lehighton, PA	Tom M., Williamsport, PA
Traci E., Export, PA	Ralph H., Kennett Square, PA
Alonso A., York, PA	Barbara B., Lebanon, PA
Jim M., Shavertown, PA	Shelly L., New Oxford, PA
Julie B., East Stroudsburg, PA	Doug S., Lancaster, PA
Jack S., Shawnee, PA	Anne R., Plymouth, PA
Linda C., Montoursville, PA	George P., Carnegie, PA
Robert A., Morrisville, PA	Scott S., Slatington, PA
Byron S., Lehighton, PA	Nicholas G., Levittown, PA
John R., Croydon, PA	Jean E., Dallas, PA
Stephanie R., Bethlehem, PA	Arthur H., Perkiomenville, PA
Jeanette L., Upper Chichester, PA	Barbara B., Lehighton, PA
Dawn N., Honey Brook, PA	Carol Y., Quakertown, PA
Robert S., Girard, PA	Deborah K., Palmerton, PA
Greg B., Erie, PA	Kevin S., Radnor, PA
Harry K., Hanover, PA	Marjorie K., Nesquehoning, PA
Samar K., Reading, PA	Aida T., Albrightsville, PA
Craig J., Reading, PA	Karen C., Shade Gap, PA
Mike M., Forty Fort, PA	Shelly L., New Oxford, PA
Elizabeth A., Columbia, PA	Emily G., Quakertown, PA
Karen L., Plymouth, PA	Kathy K., East Stroudsburg, PA
Mary B., Coatesville, PA	Les S., Sciota, PA
Rodney H., York, PA	Candace B., Lehighton, PA
Marsha A., Alvin, TX	Suzanne M., Lehighton, PA
John L., Gibsonia, PA	Cecelia T., Philadelphia, PA
Kimberly F., Johnstown, PA	Judith M., Hatfield, PA
Kim M., Hanover, PA	Sheila V., Blue Bell, PA
Doug G., Williamsport, PA	Mike D., Boyertown, PA
David F., Camp Hill, PA	Sheila V., Blue Bell, PA
Michael S., Spring Brook, PA	Misty F., Columbia, PA
Rebina B., Bristol, PA	Misty F., Columbia, PA

Thomas R., Blakeslee, PA  
Hanna T., Hanover, PA  
Christina G., Fleetwood, PA  
Lynn P., Reading, PA  
Kerry H., Sinking Spring, PA  
Salvatore Z., East Stroudsburg, PA  
Wendy C., Kunkletown, PA  
Emmy M., Fayetteville, PA  
Emmy M., Fayetteville, PA  
Selina C., East Stroudsburg, PA  
Michael W., Levittown, PA  
Victoria T., Champion, PA  
Clark M., Hanover, PA  
Jennifer S., Alburtis, PA  
Amos V., Clarks Summit, PA  
Gary B., Telford, PA  
Scott L., Palmerton, PA  
Catherine B., Muncy, PA  
Diane K., Auburn, PA  
Richard H., Muncy, PA  
Barbara B., Williamsport, PA  
William S., Montoursville, PA  
Cynthia L., Hughesville, PA  
Howard B., Shrewsbury, PA  
Cecelia T., Philadelphia, PA  
Donnie H., Barto, PA  
Ron S., Williamsport, PA  
George R., Myerstown, PA  
Gary S., Northampton, PA  
Marilyn S., Penn Run, PA  
Rose S., Kutztown, PA  
George M., Lehigh, PA  
Tamika G., Woodlyn, PA  
Jennifer R., Elizabethtown, PA  
Stephen M., Pottsville, PA  
Jason W., Wrightsville, PA  
Joyce M., Sarver, PA  
Angela S., Hanover, PA  
Rick C., White Haven, PA  
Peter F., Schuylkill Haven, PA  
Sally W., Hanover, PA  
Lynne H., Pottstown, PA  
Kevin M., Trout Run, PA  
Daniel M., Carlisle, PA  
Vince R., Cogan Station, PA

Christine M., Montoursville, PA  
Susan S., Lehigh, PA  
Stephen G., Kunkletown, PA  
Nancy R., Hamburg, PA  
Timothy G., Lehigh, PA  
Lori M., New Oxford, PA  
Bradley S., Williamsport, PA  
Concetta M., Jenkintown, PA  
Sandra M., Hillsgrove, PA  
Doug D., Myerstown, PA  
Edward B., Shickshinny, PA  
Linda H., Williamsport, PA  
Wilma B., Springfield, PA  
Robyn S., Tobyhanna, PA  
Holly T., Fleetwood, PA  
Stephanie F., Lykens, PA  
Craig W., Womelsdorf, PA  
Scott S., Shunk, PA  
Deb K., Palmerton, PA  
Kristen H., Manheim, PA  
Edward W., Allentown, PA  
Bonnie M., Red Hill, PA  
Edward H., Jim Thorpe, PA  
Rodney W., Temple, PA  
Anne G., McSherrystown, PA  
Robert K., Lehigh, PA  
Kim S., Jim Thorpe, PA  
Eran H., Gibsonia, PA  
Geraldine T., Montgomery, PA  
Pat A., Lititz, PA  
Dan M., Collegeville, PA  
Daniel W., Williamsport, PA  
Roger and Kathryn S., Ephrata, PA  
Markus M., Canadensis, PA  
Dawna M., Muncy, PA  
Thomas M., Alburtis, PA  
Steven T., Palmerton, PA  
Lucia P., Linden, PA  
Jeanette B., Ephrata, PA  
Tracy S., Macungie, PA  
Brian K., Philadelphia, PA  
Marilyn L., Lititz, PA  
Tasliym M., Chester, PA  
Liz B., Norristown, PA  
Stuart S., Harrisburg, PA

Beth R., Lancaster, PA  
Joanne B., Pittsburgh, PA  
Elaine B., Lititz, PA  
Anne W., Lititz, PA  
Elizabeth L., Philadelphia, PA  
Helen M., Lancaster, PA  
Kimberly H., Lititz, PA  
George M., Lancaster, PA  
Elaine B., Lititz, PA  
Angie C., Denver, PA  
Kathy S., Lititz, PA  
Kim V., Lancaster, PA  
Marianne S., Lancaster, PA  
Andy P., Lancaster, PA  
Robert L., Bellefonte, PA  
Karen F., Newmanstown, PA  
Joanne M., Glenside, PA  
Jon O., Dillsburg, PA  
Andrew N., Camp Hill, PA  
John B., Chester Springs, PA  
Jeff B., Allison Park, PA  
Gary E., Murrysville, PA  
Alexandra R., Old Forge, PA  
John P., Old Forge, PA  
Nicole K., Old Forge, PA  
Matt P., Old Forge, PA  
Rick N., Old Forge, PA  
Kellene H., Old Forge, PA  
Jacob H., Old Forge, PA  
Diane N., Old Forge, PA  
Julia B., Collegeville, PA  
John Z., Old Forge, PA  
Mary B., Coatesville, PA  
Timothy N., Old Forge, PA  
Tammie F., Harleysville, PA  
Candice G., Old Forge, PA  
Carly P., Old Forge, PA  
Gary S., Ambler, PA  
Kevin C., Drexel Hill, PA  
Jenna S., Collegeville, PA  
Danielle S., Collegeville, PA  
Alisha H., Old Forge, PA  
Rebina B., Bristol, PA  
Lawrence R., Lititz, PA  
Alyssa G., Duryea, PA

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Ashley S., Old Forge, PA  
Amiee F., Old Forge, PA  
Dennis F., Old Forge, PA  
Shannon E., Old Forge, PA  
Angela F., Old Forge, PA  
Sandra M., Old Forge, PA  
Calvin M., Dunlevy, PA  
Kimberly C., Philadelphia, PA  
Catherine P., Old Forge, PA  
Daniel E., Lancaster, PA  
Paul A., Bethlehem, PA  
Courtney B., Old Forge, PA  
Maggie G., Old Forge, PA  
Kathryn K., Old Forge, PA  
Mark E., Old Forge, PA  
Kimberly L., Sinking Spring, PA  
Andy B., Old Forge, PA  
Francis P., Old Forge, PA  
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Linda B., Old Forge, PA  
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Marissa B., Old Forge, PA  
Greg V., Bethlehem, PA  
Marie H., Old Forge, PA  
Ashley A., Old Forge, PA  
Kathy S., Old Forge, PA  
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Dawn N., Honey Brook, PA  
Roseann B., Old Forge, PA  
Eugene B., Cranberry Township, PA  
Madlyn L., Old Forge, PA  
Ardith T., New Hope, PA  
Lance B., Lincoln University, PA  
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Andrea M., Philadelphia, PA  
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Hannah A., Philadelphia, PA  
Gary H., Newport, PA  
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Mike A., Schellsburg, PA  
Frann S., Philadelphia, PA  
Ron S., Williamsport, PA  
Anthony D., Old Forge, PA  
Art P., Macungie, PA  
Jared B., York Springs, PA  
Martha K., Lancaster, PA  
Brandon F., Philadelphia, PA  
Cynthia H., Lansdale, PA  
Stephen K., Allentown, PA  
Mary K., Havertown, PA  
Jeff K., Havertown, PA  
Lena G., Philadelphia, PA  
Leah B., Elkins Park, PA  
Tina S., Havertown, PA  
Steve K., Freeport, PA  
Gail B., Elkins Park, PA  
Rosalind E., Stevens, PA  
Lawrence S., Havertown, PA  
Barbara Q., Malvern, PA  
Erin S., Philadelphia, PA  
Mary C., Norristown, PA  
William S., Gettysburg, PA  
Rosalind S., Bryn Mawr, PA  
Gary E., Murrysville, PA  
Teresa R., Normalville, PA  
Sharon W., Philadelphia, PA  
Zoe C., Philadelphia, PA  
MJ S., Elkins Park, PA  
Eugene B., Cranberry Township, PA  
Samar K., Reading, PA  
Charles S., Milford, PA  
Anna B., Philadelphia, PA  
Jennifer L., Allison Park, PA  
Harold Penner, Akron, PA  
Lauren B., West Chester, PA  
Laura B., Lancaster, PA  
Alan T., Wynnewood, PA  
James D., Pittsburgh, PA  
Jane G., Pottstown, PA  
Mary B., Coatesville, PA

Andrew M., Cheltenham, PA  
Holly T., Fleetwood, PA  
Kipp G., Philadelphia, PA  
Lisa H., Philadelphia, PA  
Gemma M., Philadelphia, PA  
Phyllis N., Stevens, PA  
Barry K., Akron, PA  
Clifford B., Philadelphia, PA  
Gary E., Murrysville, PA  
Brandie K., Harrisburg, PA  
Rob K., Philadelphia, PA  
John J., Scott Township, PA  
Carol D., Philadelphia, PA  
Jeffrey S., Glenmoore, PA  
Ciminy S., North Huntingdon, PA  
Amanda B., Philadelphia, PA  
Jeanette B., Lititz, PA  
Nolan L., Honesdale, PA  
Kathy A., Lansdale, PA  
Carole W., Philadelphia, PA  
Augusto F., Kingsley, PA  
Andrea P., Philadelphia, PA  
Paul A., Strasburg, PA  
Brian S., Stroudsburg, PA  
Jennifer K., Lancaster, PA  
Elaine B., Lititz, PA  
Janet S., Akron, PA  
Sara K., Linfield, PA  
Gary G., Haverford, PA  
Scott W., Philadelphia, PA  
Marilou A., Elizabethtown, PA  
Matthew Z., West Chester, PA  
Sara W., Ephrata, PA  
Stephanie F., Philadelphia, PA  
Megan B., Lansdale, PA  
Ken L., Lititz, PA  
Francine H., Lititz, PA  
Merlyn C., Stroudsburg, PA  
Perry H., Lancaster, PA  
John A., Old Forge, PA  
Donna A., Old Forge, PA  
Amanda R., Philadelphia, PA  
Mary G., Lancaster, PA  
Ronnie M., York, PA  
Brian U., Jersey Shore, PA

David M., Philadelphia, PA  
Mary R., Lancaster, PA  
Sharmaine G., Pittsburgh, PA  
Jennifer L., Glenside, PA  
Beth C., Lancaster, PA  
Faith F., Natrona Heights, PA  
Holly T., Fleetwood, PA  
Kathryn K., Lancaster, PA  
Elisabeth S., Oberlin, PA  
Julia B., Collegeville, PA  
Melody R., Lititz, PA  
Joseph C., Forest City, PA  
Tim W., Johnstown, PA  
Robert N., Old Forge, PA  
Robert N., Old Forge, PA  
Rob M., Columbia, PA  
Barbara B., Philadelphia, PA  
Melanie Y., Lancaster, PA  
Diane P., Philadelphia, PA  
Eliza B., Lancaster, PA  
Daphne D., Hopeland, PA  
Kathleen C., Palmerton, PA  
Michael B., Lititz, PA  
Stacy R., Bryn Mawr, PA  
Roni J., Landisville, PA  
Janis B., Yardley, PA  
Jodi G., Columbia, PA  
Yvonne W., Macungie, PA  
Jasmine R., West York, PA  
Amanda F., Mechanicsburg, PA  
Catherine K., Pottstown, PA  
Mijail S., Merion Station, PA  
Victoria S., Philadelphia, PA  
Erin S., Lancaster, PA  
Christine K., Beaver Falls, PA  
Leon W., Lititz, PA  
Vickie B., Cranberry Township, PA  
Gary S., Ambler, PA  
Karen L., Pittsburgh, PA  
Gary S., Ambler, PA  
Todd J., Spring City, PA  
Jenine C., Bala Cynwyd, PA  
Julia B., Collegeville, PA  
Ann S., Pottstown, PA  
Linda S., York Haven, PA

Julia B., Collegeville, PA  
John B., Chester Springs, PA  
J. S., Collegeville, PA  
Julia B., Collegeville, PA  
Dawn N., Honey Brook, PA  
Liz B., Norristown, PA  
Julia B., Collegeville, PA  
Shannon M., Phoenixville, PA  
Jenifer M., Phoenixville, PA  
Jane G., Pottstown, PA  
Jody C., Berwyn, PA  
Allen C., Berwyn, PA  
Michelle B., Old Forge, PA  
Dana M., Old Forge, PA  
Albert B., Old Forge, PA  
Jody C., Berwyn, PA  
Jenifer M., Phoenixville, PA  
Lynn A., Lancaster, PA  
Amy S., Elizabethtown, PA  
Jackie F., McKeesport, PA  
Jenifer M., Phoenixville, PA  
Hannah A., Philadelphia, PA  
Jenifer M., Phoenixville, PA  
Susan M., Pottstown, PA  
Jody C., Berwyn, PA  
Paul C., Felton, PA  
Paul C., Felton, PA  
George S., Newtown Square  
Ann D., Ambler, PA  
Lloyd K., York, PA  
Johanna J., Lancaster, PA  
Lawrence S., Havertown, PA  
Karen S., Mechanicsburg, PA  
Marai T., Akron, PA  
Shelly L., New Oxford, PA  
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## **Technical Assistance Received by the Commission**

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Act 51 established requirements for the roles of the Department of Education and other bodies in the General Assembly to provide technical assistance to the Commission:

**Role of the Department of Education:** The department shall provide the Commission with data, research, and other information upon request by the Commission. *Section 123(g)*

**Role of Other Bodies in the General Assembly:** The General Assembly shall provide administrative support, meeting space, and any other assistance required by the Commission to carry out its duties under this section in cooperation with the department. *Section 123(g)*

The Department of Education continues to play a vital role in supporting the work of the Commission since the Commission was re-established in 2023.

The Independent Fiscal Office served as a critical resource for technical expertise in handling large amounts of data provided by school districts and charter schools that assisted the Commission's deliberation on student factors, as well as other data collected important to the Commission's recommendations to the General Assembly.

The Independent Fiscal Office, in partnership with the Pennsylvania Association of School Business Officials, and the Department of Education, conducted a survey on behalf of the Commission. The survey included 100 school districts and 25 charter schools in October 2023. The survey included a broad range of school districts to reflect the diversity of districts across the Commonwealth.

The survey sought feedback on three key criteria, including: cost-multiplier estimates to quantify the expenditures necessary to educate students; best practices and use of certain programs, practices and/or activities within a school; and facility assessments. The survey results provided updated and accurate data that the Commission used in establishing weights in the new recommended formula, as well as other factors and recommendations by the Commission to the General Assembly.

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School District of Lancaster

School District of Philadelphia

Senate of Pennsylvania staff members, including: Stephen Bruder, Julie Carraghan, Crystal Clark, Michael Deery, John Guyer, Jon Hopcraft, Cheryl Kleiman, Mark Mekilo, Russ Miller, Ben Slate, Cindy Urban, Vicki Wilken, Madison Whitcomb

South Western School District