

House Education Committee
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Testimony on the [Study of Student Weights in Vermont Education Funding Formula - Dec 2019](#)

Good afternoon. I am Jeff Francis, Executive Director for the Vermont Superintendents Association. I am pleased to join you this afternoon to provide testimony on the Student Weighting Study and H.54, An Act Relating to Adjusting the Existing Weighting Factors.

I have organized my testimony into three sections.

First, I will speak to some perspectives of the Vermont Superintendents Association on equity and student weighting. Second, I will share some high level considerations with respect to the Weighting Study. And finally, I will offer some very brief comments on H.54.

As background, I want to explain that the membership of the Vermont Superintendents Association comprises all fifty-five of Vermont's superintendents. In general terms, the Association supports superintendents in their work both collectively as a group and as individuals in the communities they serve.

An important part of the Association's work involves participating in the public policy arena in support of an efficient, effective and equitable education system.

I want to start by referring you to a document published by the Vermont Agency of Education titled [Roles and Responsibilities in Vermont School Systems](#). The document outlines respective duties for school boards, superintendents, principals and teachers.

The reason that I am starting here is because among the duties indicated for superintendents are two worth noting in the context of a discussion about the Weighting Study.

One relevant responsibility is *Ensuring quality of education and equity of opportunities within the system.*

A second is *Managing services, programs and resources, for the quality of learning and for the implementation of the school board's annual district education plan and budget.*

So, the superintendent's obligations go both to equity of opportunity and managing services, programs and resources, within the context of a district budget and available monetary resources.

The superintendent's interests and the interests of the communities that they serve center both on equity and on resources.

I think it is fair to suggest that the highest priority for Vermont's public education system is equity. It is the basis for the current funding system, and in fact, under the Brigham Decision is the essence of that system.

In 2018, VSA worked with the Vermont School Boards Association to develop an operational definition of Educational Equity, and I am pleased to share the definition with you:

Educational equity means that each and every student receives the resources and educational opportunities they need to learn and thrive.

- *Equity means that a student's success is not predicated nor predetermined by characteristics such as race, ethnicity, religion, economics, class, geography, disability, language, gender, sexual orientation, gender identity or initial preferences.*
- *Equity means that every school provides high quality curriculum, programs, teachers and administrators, extracurricular activities and support services.*
- *Equity goes beyond formal equality where all students are treated the same. Achieving equity may require an unequal distribution of resources and services.*
- *Equity involves disrupting inequitable practices, acknowledging biases, employing practices that reflect the reality that all students will learn, and creating inclusive multicultural school environments for adults and children.*

In my opinion, the definition of educational equity supports the importance of the evaluation of the student weights within the education funding formula and reinforces the importance of adjusting the weights to make the funding system more equitable.

For just a bit more context, I'd also like to share one very prominent goal of Act 46. While the law has been controversial in some communities, the goals stand up as very purposeful when one considers overall efforts to have a sound and equitable public education system serving all of Vermont's children. The first goal listed in Act 46 is:

(1) provide substantial equity in the quality and variety of educational opportunities statewide;

Also In terms of context, I would also like to share two insights about how I believe superintendents view their role in the education leadership arena. When I applied for the job of executive director, having never served as a superintendent myself, I interviewed a number of individuals well-situated to share their perspective on the role. A person who some of you may know, David Larsen, was the chair of the House Education Committee at the time. David also was an educator himself. He eventually served as the chair of the state board of education and interim education commissioner. In describing superintendents, David used the term "pragmatic visionary" which I interpreted as needing to have one foot firmly planted in the current realities while continuously thinking about how to create a better future.

A second insight came to me when, immediately after the passage of Act 60, a landmark legislation intended to achieve greater equity, I toured the state as part of a team to explain the law. Through that experience I learned about the very deep passion folks hold and express on the topics of their children - and the education of children in general, and their property taxes. Superintendents are very cognizant and respectful of those passions.

The implications of the Weighting Study and its effects, involve both.

As the General Assembly considers how to implement the Weighting Study Recommendations, and they should be implemented, one tendency may be to look past all of the explanation and rationale to the financial modeling.

The Study provides modeling, which was [updated in February of 2020](#), as the General Assembly prepared for the review that you are engaged in today.

When you examine the modeling, you see that if the proposed weighting changes are adopted, there will be tax rate adjustments in most communities. In some communities tax rates would go down, in other communities they would rise. And the full range of tax rate changes is impressive.

Despite the complexity of the education funding system overall, at its core, it is elegantly simple. There are two most significant factors. The numerator, which is education spending for the district, and the denominator, which is equalized pupils (the number which is adjusted through weighting). The calculation yields spending per equalized pupil - the dollar amount that determines the tax rate. So, when the weighting factors are changed, the education spending per equalized pupil changes, and, all other things being equal, tax rates change.

So, as you can understand, the act of changing the weights will bring relief to some communities (where equalized pupils increase) and undoubtedly create challenges in others (where equalized pupils decrease).

To elaborate just a bit, one can imagine a dynamic where communities that have experienced higher levels of investment at a lower tax rates would find the changes challenging and communities where the change in weights would result in an ability to invest more in the education at the same or lower tax rates would feel relief.

Superintendents understand this dynamic very well. And, in their role as pragmatic visionaries, they need to be grounded both in the reality of what is, and in planning for what will be.

Because VSA's membership comprises superintendents serving all communities of the state, and because superintendents have both equity priorities and local taxpayer considerations, for the Vermont Superintendents Association, it is prudent to consider the findings of the Weighting Study not from the perspective of individual superintendents or districts, they can speak for themselves, but rather from our vantage point of as a statewide association.

While the Association has not formally adopted the following principles, on two occasions in my role as Executive Director, I have presented these principles to superintendents as

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recommended guiding principles for considering the Weighting Study. These principles are generally agreed to:

- Achieving greater equity should be a primary goal behind making adjustments to the funding system
- The Weighting Study establishes that the existing weighting weights need to be adjusted
- Legislative considerations for how to adjust the weights should take into account the findings of the study and the importance of informing communities of the effects of changes to the weighting system
- The purpose of adjusting the weights should be to support increased investment in the education of students tied to the commensurate weighting and/or to address the cost and associated tax rates reflecting sound investment in student learning and opportunity (not tax rate reduction as the goal of weighting changes)
- Maintain a focus on what is better for students and fairer for taxpayers in the context of the education delivery system as a whole
- Acknowledge the challenges associated with planful utilization of resources for all communities affected by the weighting changes
- Policy action associated with weighting changes should be aligned with Act 173 implementation overall (i.e. categorical grant for special education or address through the changes to weighting, etc)

In my opinion, and I believe in the opinion of the Association, the importance of careful consideration of the process for implementing the weighting changes cannot be overstated. The weighting changes need to occur for more fairness and equity in the system. And, the implications and effects for all communities should be understood and considered in fashioning the specific method for making the change.

Whether H.54 is precisely the right approach remains an open question. However, the bill reflects a well-reasoned approach in that it both implements the recommendations of the Weighting Study and phases in the effects on districts that will see tax rates increase as the result of a loss in their equalized pupil counts associated with the weighting changes. The length and nature of the phase-in is a policy decision for the General Assembly.

H.54 also eliminates the excess spending threshold and small schools grants and includes the recommended weighting for contending with sparsity and geographic isolation. These are useful changes in the context of the H54 approach overall.

I would be happy to return to discuss H.54 in more detail and any other legislation that you will consider as you continue your work on this very significant matter.

Thank you.