



Annual Privatization Report 2015

Education

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Contents

- A. Private School Choice
- B. Education Savings Accounts
- C. Charter School Market Share
- D. School Choice Performance Outcomes
- E. Weighted Student Formula Expansion in the United States



A. Private School Choice

Nationwide, states have continued to march forward in their efforts for more school choice. Years of these legislative victories have led to a total of 53 school choice programs available to children and their families across the United States and Washington D.C.¹ An estimated 315,000 students used vouchers and tax-credit scholarships to enroll in the school of their choice in 2014, and an additional 880,000 parents and families received tax relief through individual tax credits/deductions for approved educational expenses.²

A January 2015 national poll conducted by the American Federation for Children found that close to 70% of Americans support school choice with 63% supporting publicly financed private school choice and 76% supporting charter schools.³ The poll found that 65% of those surveyed believe that “choice and competition” among schools improves education.⁴ In addition, a 2014 study from the Friedman Foundation for Educational Choice found that over the last 20 years, school vouchers that help pay private tuition for students who moved from their local public schools saved more than \$1.7 billion in public dollars for education.⁵ This is because private schools generally spend less per student than public schools.

In April 2014, **Kansas** lawmakers passed the Kansas Tax Credit for Low Income Students Scholarship Program, which allows corporations to claim a 70% tax credit for contributions to approved Scholarship Granting Organizations (SGOs), which are nonprofits that provide private school scholarships.⁶ Each SGO determines the amount of the scholarships it awards to students, up to \$8,000 per student for tuition, transportation and school-related fees. While there is no limit on the dollar amount of the tax credit that can be claimed by each corporation, the state total amount of tax credits per year is limited to \$10 million. Students who attend lower-performing “Title I focus” or “Title 1 priority” schools (failing), who have family incomes within the eligibility guidelines of the federal free lunch program, (\$31,005 for a family of four in 2014–15), and have attended public school the year before are eligible to receive a scholarship.

On April 8, 2015, **Arkansas** Governor Asa Hutchinson signed the Succeed Scholarship Program for Students with Disabilities, which will allow parents of special needs students to use public funding to send their child to the school of their choice. The program will begin in the 2016–2017 school year and each child’s voucher will be funded at the child’s public school foundation level up to the amount of tuition at the private school.⁷

That same month, **Nevada** also passed a new education tax credit scholarship program that will allow businesses to claim up to \$10.5 million in tax credits over the next two years to donate to private scholarship organizations that pay for private school tuition for low-income students. Families that participate will be offered scholarships up to \$7,755 per student per year and can have incomes up to 300% of the poverty level, around \$73,000. More than 70% of Nevada students would be eligible to receive a scholarship.⁸

B. Education Savings Accounts

In 2014–2015, the idea of Education Savings Accounts (ESAs) gained traction. ESAs are a school choice model where state and local education funds go directly to parents, who use the money to customize their child’s education. **Arizona** enacted the first ESA school choice program in 2011 and has expanded the program every year. Currently in Arizona, students with special needs, children in the foster care system, children from active duty military families, and children enrolled in “D” or “F” schools or school districts are eligible. In February 2015, the Arizona Senate voted to expand the ESA program to all Native American families living on one of the state’s 22 reservations, which could offer eligibility to up to 55,000 more students in Arizona.⁹ Currently, just over 1,200 students have ESAs, at a cost to the state of about \$16.2 million.¹⁰ In the Arizona model students receive 90% of the funds the state would have paid for their education if they remained in a public school. In March 2014 the Arizona Supreme Court ruled in favor of the ESA, upholding an appeals court ruling that argued that parents don’t have to spend the ESA funds on tuition for private schools—and consequently, the program is not in violation of the state’s constitution.¹¹

In June 2014 **Florida** launched the nation’s second ESA program called the “Personal Learning Scholarship Account Program.”¹² Florida’s ESA allows students with special needs an opportunity to receive an account funded by the state and administered by an approved scholarship-funding organization. The student must have a disability with an Individualized Education Plan or be diagnosed with a specific disability, such as autism, down syndrome or spina bifida. Like Arizona, the Personal Learning Scholarship Account will equal 90% of the state and local funds reflected in the state funding formula that would have been spent on the student at a public school. Parents can purchase a wide variety of educational services such as tutors, online classes, school tuition, therapeutic services, and curriculum material and textbooks. Any money that is left over from one year to the next can be placed in a college savings account for the student. More than 1,400 students are using ESAs for the 2014–2015 school year in

Florida.¹³ In addition, Florida expanded its tax credit scholarship program to allow more children to qualify for the nation's largest private school choice program with 67,000 students. The new law removed the requirement that students must attend a public school in the previous year and expanded the income eligibility to students so that a family of four earning up to \$62,010 a year will be eligible for a partial scholarship—a nearly \$20,000 increase from the previous limit of \$43,568.¹⁴

On April 16, 2015 **Mississippi** became the third state to enact an education savings account program. Mississippi's Equal Opportunity for Students with Special Needs Act will allow parents of students with special needs to customize their child's education with public funding that would have gone to a residentially assigned school. Students will receive a \$6,500 scholarship to customize their education and the program is open to 500 students the first year and then can grow by 500 students each subsequent year.¹⁵

That same month **Tennessee** also enacted an ESA school choice program. Parents will receive quarterly payments to their student's Individualized Education Account based on the level of state and local funds that would go to the child's zoned school and the special education funds the student would be entitled to based on his or her Individualized Education Plan. Each year parents may save any unused funds for tuition and higher education costs. In the first year, 18,000 special needs students will meet the criteria to participate in the program.¹⁶

Finally, as reported by the Cato Institute's education analyst, Jason Bedrick, the success of the nation's Education Savings Account programs has led to a flurry of legislative activity across the nation in 2015, with several state legislatures considering education savings accounts (ESAs), including Colorado, Delaware, Georgia, Oklahoma, Oregon, Iowa, Montana, Nebraska, Nevada, Rhode Island, Texas and Virginia.¹⁷

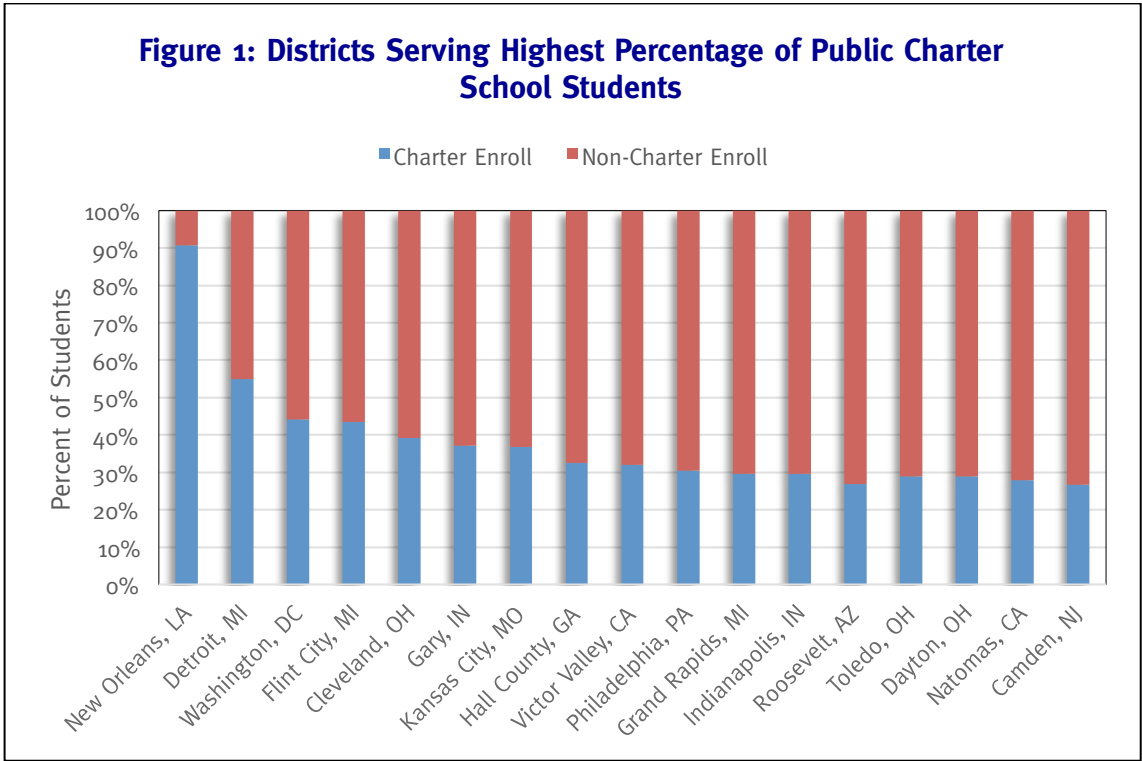
C. Charter School Market Share

Charter schools are the fastest growing school choice option in the United States and now represent 5% of students enrolled in public schools.¹⁸ According to the National Alliance for Public Charter Schools, more than 500 new charter schools opened in the 2014–2015 school year enrolling 348,000 additional students. As of February 2015, there are now 6,700 public charter schools enrolling more than 2.9 million students throughout the United States.¹⁹ Nationwide in 2014 there were also 200 charter schools that closed because of a variety of reasons, including low academic performance, financial difficulties and low enrollment.²⁰

According to the National Alliance for Public Charter Schools (NAPCS) ninth annual edition of *A Growing Movement: America’s Largest Charter School Communities*, 12 districts have at least 30% of their public school students enrolled in charter schools, 43 districts have at least 20% of their public school students enrolled in charter schools, and close to 150 districts now have at least 10% of public school students enrolled in charter schools.

The report also found that New Orleans continues to have the highest market share of public school students attending charter schools. An astounding 91% of New Orleans public school students enrolled in charter schools in the 2013–14 school year. Detroit and Washington, D.C. also each have a notably large share of their students attending charter schools. In the 2013–14 school year 55% of students living in Detroit and 44% of all public school students in Washington, D.C. attended charter schools.

Figure 1 shows the school districts serving the highest percentage of public charter school students in the 2013–14 school year.



Source: NAPCS ninth annual edition of *A Growing Movement: America’s Largest Charter School Communities*

Table 1, below, shows the school districts serving the highest percentage of public charter school students and their 2014 rank and market share compared to their 2013 rank and market share.

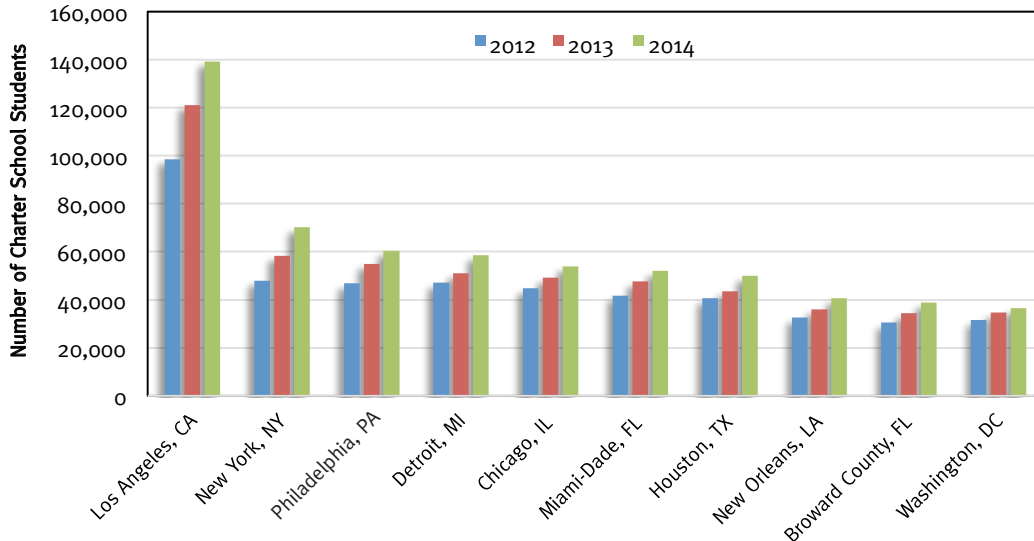
Table 1: Districts Serving the Highest Percentage of Public Charter School Students

2014 Rank	School District	State	Charter Market Share	Total District Enroll	Rank in 2013	Market Share 2013
1	New Orleans Public School System	LA	91%	44,699	1	79%
2	Detroit Public Schools	MI	55%	106,805	2	51%
3	District of Columbia Public Schools	DC	44%	82,958	3	43%
	Flint City School District	MI	44%	12,574	4	36%
4	Cleveland Metropolitan School District	OH	39%	47,432	7	29%
5	Gary Community School Corporation	IN	37%	13,678	5	35%
	Kansas City Missouri School District	MO	37%	24,091	4	36%
6	Hall County Schools	GA	32%	26,919	6	32%
	Victor Valley Union High School District	CA	32%	14,179	N/A	N/A
7	The School District of Philadelphia	PA	30%	198,059	8	28%
	Grand Rapids Public Schools	MI	30%	22,723	10	26%
	Indianapolis Public Schools	IN	30%	43,727	8	28%
8	Roosevelt School District 66	AZ	29%	14,165	9	27%
	Toledo Public Schools	OH	29%	32,441	9	27%
	Dayton Public Schools	OH	29%	22,633	8	28%
9	Natomas Unified School District	CA	28%	13,152	N/A	N/A
10	Camden City School District	NJ	27%	15,911	N/A	N/A

Source: NACPS ninth annual edition of *A Growing Movement: America's Largest Charter School Communities*

Figure 2 shows the top 10 school districts serving the highest number of public charter school students in 2014 compared to their two previous year's charter school student enrollment.

Figure 2: Districts Serving Highest Number of Public Charter School Students



Source: NACPS ninth annual edition of *A Growing Movement: America's Largest Charter School Communities*

Table 2, below, lists the top 10 school districts serving the most public charter school students in 2013 compared to their rank and enrollment in 2012.

2014 Rank	School District	State	Charter Enrolled	Total District Enroll	Rank in 2013	Charter Enrolled 2013
1	Los Angeles Unified School District	CA	139,174	652,421	1	120,958
2	New York City Department of Education	NY	70,210	1,052,772	2	58,353
3	The School District of Philadelphia	PA	60,385	198,059	3	55,031
4	Detroit Public Schools	MI	58,612	106,805	4	51,083
5	Chicago Public Schools	IL	53,996	397,972	5	49,187
6	Miami-Dade County Public Schools	FL	52,049	356,238	6	47,573
7	Houston Independent School District	TX	49,885	242,740	7	43,546
8	New Orleans Public School System	LA	40,547	44,699	8	36,126
9	Broward County Public Schools	FL	38,825	263,358	10	34,408
10	District of Columbia Public Schools	DC	36,565	82,958	9	34,674

Source: NACPS ninth annual edition of *A Growing Movement: America's Largest Charter School Communities*

D. School Choice Performance Outcomes

School choice programs continue to boost academic performance for disadvantaged students. A July 2014 study from the University of Arkansas's Department of Education Reform found that charter schools generally produce better results than traditional public schools for less money. Researchers found that for every \$1,000 in school funds, charters on average produced higher scores in both reading and math on the National Assessment of Educational Progress.²¹ Charters produced NAEP scores that were 16 NAEP points higher and reading scores that were 17 NAEP points higher than traditional public schools.²²

In addition, a March 2015 study by Stanford University's Center for Research on Education Outcomes finds that urban charter schools are significantly outperforming the traditional district peers in reading and math. The report looked at 41 urban areas and found that students in urban charter schools are receiving on average the equivalent of 40 extra days of learning in math and 28 extra days in reading per year.²³

School choice also has positive effects on long-term education outcomes like attending and completing college for disadvantaged students.²⁴ A Harvard Program on Education Policy and Governance study finds that minority students who participated in New York City’s privately funded school voucher program and received a voucher in 1997 were, by 2013, 10% more likely to enroll in college and 35% more likely than their matched peers in public schools to obtain a bachelor’s degree.

E. Weighted Student Formula Expansion in the United States

Student-based budgeting is a policy tool that allows education funds to be distributed in a more equitable, efficient and transparent manner. While it goes by several names, including “fair student funding,” “backpacking,” or most commonly “weighted student formula” (WSF), the underlying concept is the same: education funds are tied to specific students based on their unique needs and provided directly to schools in real dollars, not staffing positions or other programmatic allotments.

Comprehensive student-based budgeting models have been implemented throughout the U.S. at both the district level (e.g., New York, Denver and Houston) and at the state level (e.g., Rhode Island and Hawaii). Interest continues to grow as governors, school boards and superintendents seek to make funding more equitable and close achievement gaps. In 2014–2015, several additional states and school districts are showing interest in adopting or expanding the school finance portability model:

- **Nevada:** At the state level, Nevada Governor Brian Sandoval spent considerable time during January’s State of the State address outlining proposed education reforms, including an additional \$782 million in funding.²⁵ According to Sandoval, “The 40-year-old Nevada Plan for School Finance must be modernized to consider the needs of individual students. A better alternative uses ‘weighted formulas’ where students with differing needs would receive additional dollars based on a percentage of the base amount.”²⁶ Under his plan, funding categories—such as special education and English language learners—would be introduced over several years until the formula is finalized.
- **Pennsylvania:** Pennsylvania’s Education Funding Commission is currently exploring ways to make the state’s funding formula more equitable. A root cause of the current inequity is the state’s hold-harmless provision, which

provides districts with a guaranteed floor of funding regardless of enrollment fluctuations.²⁷ According to testimony by Nathan Benfield and James Paul of the Commonwealth Foundation, hold harmless has contributed to a situation where in 2012–2013 25 districts received more than \$10,000 per pupil compared to 50 districts receiving less than \$3,000 per pupil.²⁸ They believe Pennsylvania would benefit from a weighted student formula, stating “WSF is a simpler, more transparent allocation method that does not leave schools guessing about next year’s bottom line. Some districts might receive less state aid under a WSF model, but this is only because their status-quo funding levels are disproportionate to their students’ needs.”²⁹

- **Georgia:** In Georgia, Governor Nathan Deal’s Education Reform Commission will conduct a comprehensive evaluation of how to improve education in the state, including potential changes to its Quality Basic Education funding system.³⁰ Deal has indicated support for implementing a weighted student formula system that responds to student needs and provides local autonomy.³¹
- **Arizona:** Arizona Governor Doug Ducey’s Classrooms First Initiative seeks to modernize Arizona’s school finance system and increase the percentage of funds spent on teachers and instruction.³² He has also proposed a mechanism that would provide high-performing schools with debt-service relief in order to free up additional funds for use in the classroom.³³
- **Nashville, Tennessee:** At the district level, Metro Nashville Public Schools continues its efforts to decentralize budgeting and empower principals via student-based budgeting. All of the district’s 139 schools will use the system next year, which will increase a principal’s budgetary discretion from about 5% to up to 80% of school funds.³⁴ Its weighted student formula provides a base allocation of \$4,250 per pupil and provides additional funds based on student characteristics.³⁵ Under this system budgets will give principals flexibility with resources based on real-time needs, unlike the former system that mandated staff positions and provided little discretion.³⁶ MNPS has provided principals with training to increase their effectiveness with the new system and has implemented an internal audit system to promote transparency.³⁷ MNPS will propose a hold-harmless provision that will compensate schools that lose revenue due to the formula, which might require a mix of additional funding and cuts.³⁸
- **Philadelphia, Pennsylvania:** In Philadelphia, Superintendent William Hite’s Action Plan 3.0 focuses on four anchor goals, including achieving college and career readiness for all of graduates.³⁹ A core component of this plan is to

increase equity among schools, which could result in high-performing schools being granted “100% autonomy” and “charter-like flexibilities.”⁴⁰ Implementing his comprehensive plan would require a significant increase in resources: \$309 million next year and more than \$900 million in the next five years, despite existing shortfalls.⁴¹ Public sentiment could be in favor of widespread reforms, however, as a recent poll found that education is the top issue for residents and that only 19% consider the performance of schools to be “good or excellent.”⁴² Hite plans to pilot a weighted student formula, which the district previously piloted in 2010.

- **Cleveland, Ohio:** Cleveland Metropolitan School District is preparing to enter its second year of student-based budgeting, which was instituted as part of The Cleveland Plan in 2013–2014.⁴³ Cross-functional district support teams are helping school leaders prepare effective budgets and plan for areas such as academics, special education and human resources. CMSD reports that, while some teachers may have to transfer schools, none is expected to lose a job due to enrollment declines at individual schools.⁴⁴ School choice will result in almost half of the district’s schools being increased based on expanded enrollment.⁴⁵
- **Jefferson County, Colorado:** In Colorado, Jefferson County Public Schools is implementing student-based budgeting after two years of due diligence.⁴⁶ The district plans to give principals more autonomy next year in deciding how to most effectively direct resources based on student and community needs. School-level committees will provide recommendations on priorities and district staff will support school leaders in the budgeting process.
- **Minneapolis, Minnesota:** Last fall Minneapolis Public Schools implemented Acceleration 2020, a new strategic plan that seeks to meet community needs by allowing schools to apply for the ability to manage resources including budget, staffing and programs.⁴⁷ As part of this effort, MPS is transitioning to a weighted student formula, which will be fully implemented by the 2015–2016 school year. MPS believes such changes will help schools reach performance targets that have been set for the next six years.⁴⁸ A dynamic scorecard will provide timely data and track progress on over 40 metrics.

Districts that already employ comprehensive student-based budgeting continue to refine their practices. Boston Public Schools, for example, evaluates its weights annually and now uses achievement and attendance data to identify and fund students who are drop-out risks.⁴⁹ Such reviews allow them to adjust to changes in demographics and respond to student needs. Additionally, district leaders might strive to continually increase the portion of spending that is allocated via weighted student formula, as some districts

have done. In one study, this ranged from 23.5% to 42.1% of total annual spending among the 12 districts evaluated.⁵⁰ Baltimore City Public Schools explored an innovative way to incorporate district-level technology support into its per-pupil allotment, and Denver Public Schools added revenue from the Mill Levy property tax fund to its formula—both examples of how districts can continue to provide schools with greater autonomy and more customized funding once student-based budgeting is implemented.⁵¹

Reason Foundation's own recent original school choice research proves that increasing the amount of money that follows the child matters. Reason's *Weighted Student Formula Yearbook*'s central empirical finding was that school-level budget autonomy, where more money follows the child, was strongly associated with school district performance.⁵² A school district that allocated 50% of its budget to follow the student to the school level was nearly 10 times more likely to close achievement gaps than a district that only allocated 20% of its budget to follow the student.⁵³ We also found that New Orleans, with absolute school choice, where 98% of the money follows the student, outscored every other large urban district in our analysis, to have the fastest rate of student academic improvement in proficiency in reading and math.⁵⁴

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