

Preliminary Comments on the “Report of the Task Force on Pupil Weighting”

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Introduction

Education is the single largest expenditure in the state budget at \$1.8 Billion.ⁱⁱ It is essential that we think wisely and carefully of personal and organizational imperatives. It is ultimately the preservation of hope and clarity in a world that seems woefully short of these commodities. The task force members are to be commended for their dedication and work on a task of enormous complexity under rigorous and demanding conditions. The same attributes characterize the staff of the Joint Fiscal Office (JFO), the Agency of Education (AOE) and members of various groups who volunteered their time and expertise.

It is for just this reason that the topic deserves more than a “final draft” with a turnaround of two days. The consideration of this report must and, hopefully will be driven by our embrace of the commonwealth, and will be discussed, debated and modified with care by the General Assembly. It needs the balanced perspective of all.

The following comments are direct for such is needed. This brief review is characterized by paradoxes:

- With competing perspectives, philosophies and constituencies, differences are inevitable.
- The report has the mixed blessing of breadth which allows a comprehensive view but results in inadequate explanations and foundations.
- Due to the press of time, vital areas are simply not addressed. These omissions must be filled before moving forward.
- Interactions with other programs and functions of government must be woven together else we cannot reach our aims.
- We also have the advantage of a federal fiscal incentive which may be a one-time event but offers the opportunity to pay transition costs

Building the Ethos of Progress with Competing Complexities

We have more than one approach and legislators will have to vote on things that are the most fair and not simply what is best for their political or organizational interest. Levels of understanding and interest will vary and all have to be brought in. We have the UVM weighting study, the *cost equity model* and an amalgam of independent funds that represent conflicting policy directions, obstacles and opportunities.

- Begin with the purpose of education (16 VSA 1) Several task force members and testifiers raised this imperative.ⁱⁱⁱ Yet it did not center your work. Failure to attend to the basic mission shortchanges our social obligations. Measure these purposes with valid measures, and use them as the touchstone of your work. Test scores are not a proxy for a fully educated person or of a civil society. Consider school shootings, climate degradation, and a political system that is tearing itself apart. The purpose of education is a democratic society. Anything else is a meaner, misleading and lesser vision of what we should be.. In measurement talk, we have to change the dependent variables
- Put it in English that a non-specialist can readily understand and explain to another. Avoid constructions such as

Monitor the implementation of the new Act 173 special education census block grant funding and its potential connection to pupil weighting as overall school funding modifications are considered moving forward.

This is true enough but it is insider talk.

- Expand the role of the education tax committee. This will likely change the role of the legislative committees and the state board^{iv}. Going back to the early twentieth century, we need a body that looks with an “eye single” to the good of education. This is a group different from that which checks construction, licenses teachers and other such clerical functions.

Inadequate Explanations, Foundations and Guesses

Beginning with this section, I shift to more technical considerations. The Task Force spent the most time in these domains.

Fully vet the model over at least two full trial years of parallel efforts. THIS IS OF ENORMOUS IMPORTANCE.

We simply don’t know which pieces fit effectively with others. Despite the best of our knowledge, some good-sounding notions are untested and many ideas will have to be modified to fit Vermont’s traditions and structures. This will take time, care and people will have to be held harmless as well as money.

For example, **Act 173** despite good motives and theories about census based funding, is plainly regressive and runs contrary to the equalizing effects of the adjusted Pupil Weighting Factors (PWF) weights. As spelled out in the Task Force (TF) report (but apparently ignored) modifying variables such as the poverty and sparsity weights knock other variables out of alignment to some unknown degree and potentially nullifies the very equity features it was designed to alleviate. The Pupil Weighting Formula (PWF) study recognizes the census based special education model but the task force reports nothing specific on interactions. The PWF approach says “a different or hybrid approach may be warranted (p.12).” At this stage of the initiative a more definitive and less evasive conclusion is needed. In special education the money we are talking about is \$223.7 million^v -- and we do not know how it will behave.

Missing Pieces and Unaddressed Areas

By the professional standards normally expected for a study of a state education funding system this work is not complete nor free-standing. Other background documents need to be uncovered and explored.

Typically found in the appendix, technical background documents (and particularly the regression coefficients) are usually provided. They are not there. Yet, they are the backbone of the weights and would shed valuable light on important questions. The weighting model table (p.48) gives the appearance of being technical but it is not of any particular value to designers or users. Other concerns:

- The fundamental charge to the task force was to plan the Implementation of the weighing study. Instead, two differing sets of recommendations are set forth with no explanation for the deviation. Considerable drift is evident.
- In a lukewarm endorsement of their charter the report says, “However, if the desire of the General Assembly is to continue with a pupil weighting methodology. . . .”
- The reasons that some areas have categorical weights and others do not is not explained.
- The recommended weights are placed in the middle of p.3 and p.4 bereft of any explanation of what they are, how they were derived or how they are to be used. The report does not explain their recommendations.
- The report lists the two mooted approaches for the all important poverty adjustments. An 8 page external memo is referenced. Yet, the report proper does not weigh in with a careful examination or a recommendation (P. 3-4). For this most important of variables a *mystery variable* is supposed to emerge.
- A key concept (additive and multiplicative functions) are presented but not explained. What are these functions and why are they needed?
- Cost Equity Payments - This is a translation of traditional weights into dollars but what, how and why is not explained. It potentially saves unspecified money but that won't be seen by anyone. This violates transparency. This would also give the state an incredibly easy way to cut education aid in making the annual determinations. This needs anchoring with an index adjustment.
- The descriptions of the categoricals average about 4-5 lines each with limited explanations of how they were derived.. This is insufficient.
- Recalibration of weights (p..18) – This is what the task force was charged with doing.
- ELL is relatively explained but the differences between ELL population and density interjects differences that are not controlled. Bottom line. This is a longer section but shows limited command of ELL demographics and education policy initiatives.

Conclusions

This plan is not ready for implementation. It is incomplete.

Hasty implementation augers a very low probability of being successful. A more positive approach is to run a series of carefully designed simulations and studies to determine the relevant factors and how they interact. In the long run, this will save time and money.

The greatest danger is that the new system will collapse and no notice will be taken for another decade.

The natural cycle for education reform is about ten years. The partisans of the prevailing view are enamored of their solution to such a degree that they don't see the short-comings. This is fueled by an incredibly complex system which can and will be seen, like the blind men and the elephant, to confirm their predispositions.

The report bemoans the fact that the current formula is "complicated." This plan is very complicated. People must accept that finance formulas are inherently complex. The fact that the AOE has so few computer and statistical support staff is shocking and indefensible. This is not the way to manage \$1.8 Billion dollars. To gamble with this sum based on claims and unsupported statements is unwise.

Currently, we have a system that can explain about half of the variation in children's learning^{vi}. Some opine that the remaining half is due to teaching quality variation. This is intellectually unsubstantiated. We must venture into the interaction and of families and communities in a broader definition of learning and schools. Similarly indefensible, is using the district as the unit of analyses. This covers up valuable knowledge.

Others suggest that the DMG report will be a sufficient guide for explaining and remedying education related problems. This is naïve. The problem is it uses "best practice" as a benchmark for what we trying to do. "Best practice" means the remedy has not proved strong enough to be considered "research based."

At this stage in our knowledge about schools, we have to engage poverty, isolation, weak communities, families and other things not always viewed as education.^{vii} We are at a turning point in the future of humankind. Do we collectively have that much fortitude and charity? Universal education saved the nascent democracy in the eighteenth century. Will it save the twenty-first?

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ⁱⁱ Preliminary Education Fund Outlook for FY 2022, December 1, 2021

ⁱⁱⁱ See this author's earlier testimony "Weighing the Weighting study">

^{iv} Full disclosure - The author served as vice-chair of the Vermont State Board of Education for a portion of the ten years he served in this body.

^v Preliminary Education Fund Outlook for FY 2022, December 1, 2021

^{vii} <https://profiles.stanford.edu/sean-reardon>