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Determining the True Costs of Educating Underserved Students

**HB 186- Cost Study of Bilingual/ESL and Compensatory Education,
Invited Testimony of IDRA – Presented by David Hinojosa, J.D., IDRA National Director of
Policy before the Texas House Public Education Committee, March 7, 2017**

Chairman Huberty and Members of the Committee:

Thank you for allowing the Intercultural Development Research Association (IDRA) the opportunity to present written testimony of its research and analysis on school finance and cost studies for economically disadvantaged and English learner students.

IDRA is an independent, non-profit organization that is dedicated to assuring equal educational opportunity for every child through strong public schools that prepare all students to access and succeed in college. Since its founding in 1973, IDRA has conducted extensive research and analysis on Texas school finance, including cost studies, which have been used to help inform policymakers for the past five decades.

Strong, recent research shows that increased funding by the states has contributed to both improved student performance and lifetime outcomes, especially for underserved students (Jackson, 2016; Lafortune, 2016). Cost studies enable legislators to bridge educational funding policy with effective research and practice.

Yet, Texas has historically funded its public schools based on available appropriations and politicking as opposed to actual student need. Consequently, Texas's school finance system remains largely inequitable for its low-wealth school districts and, across Texas, inadequate for its special populations, including English learner (EL) students and students from economically disadvantaged families (ED), or low-income students.

History of Funding: Bilingual/ESL Education and Compensatory Education

In 1976, IDRA engaged in a bilingual education cost study using an *expert panel* methodology to identify what practitioners in the field of bilingual education considered to be critical elements of an effective bilingual education program. These included: student assessment, program evaluation, supplemental curricular materials, staffing, staff development and parent involvement. In the IDRA bilingual education cost model, only those costs unique to the implementation of the specialized program were considered (Robledo, 2008).

IDRA researchers collected actual cost information on the various components and developed an actual dollar cost figure for program delivery. The bilingual education cost levels varied slightly depending on the grade levels involved and the number of years a program had been in existence, with newer programs reflecting slightly higher costs for start-up. The study recommended a weight between 0.25 and 0.42 (Robledo Montecel & Cortez, 2008).

Around the same time, the Governor's Office of Educational Research and Planning conducted an audit of exemplary school districts, resulting in a recommendation for a "beginning" bilingual weight of 0.15 for bilingual education programs, with an increase to 0.40 in two years. The Governor's bill was defeated, and the allotment was set at \$50 for each student in a bilingual program and \$12.50 for each student in an English as a second language class (Dietz, 2004).

In 1984, the legislature convened a school finance working group to study school finance, including the weights. The working group consisted of educators, school leaders, and legislators, among others. After examining the essential services and programs required to assist EL students and ED students in meeting state expectations and standards, the group recommended a (0.4) weight for both bilingual education and compensatory education. **While the legislature rejected the proposed weights and arbitrarily reduced the bilingual weight to 0.1 and the compensatory weight to 0.2, importantly the legislature went to a weighted system tying the additional funding to the regular program allotment.**

In 2004, the state commissioned a cost-function study that analyzed low student passage rates on the state assessment. The state study concluded that it would take an additional \$1,248 to assist an EL student who failed to pass the state assessment and an additional \$1,960 to assist an ED student who failed to pass the state assessment. The state did not adjust the weights upward in response to the study (Dietz, 2004).

Performance and Need

Over 30 years later, the weights remain unchanged, but the standards and expectations for students and schools continue to evolve. Attached you will find longitudinal demographic information for EL and ED students, as well as the most recent STAAR student group performance rates, college readiness outputs, graduation rates and dropout rates (Appendix 1). These data reflect significant gaps between ED and non-ED students and EL and non-EL students, in spite of successful individual ED and EL students are experiencing in classroom across Texas, it does show significant challenges facing our schools today. With such great and immediate need, there appears no reason the weights should not increase significantly for the next biennium while a cost study is being conducted to determine the more precise weights.

In 2016, IDRA identified [six state policies and practices](#) contributing to higher student dropout rates and two of these policies – unfair funding and low funding and insufficient support for EL students – directly implicate school finance (the other four are in-grade retention policies, zero tolerance policies, watered-down, non-college prep curriculum and high stakes testing).

Expertly-designed and well-supported cost studies that follow the essential elements below can help provide the legislature with critical information that can enable it to support a high quality education for the state's growing EL and ED students.

Essential Elements of Expert Cost Studies



Cost Studies Across the States

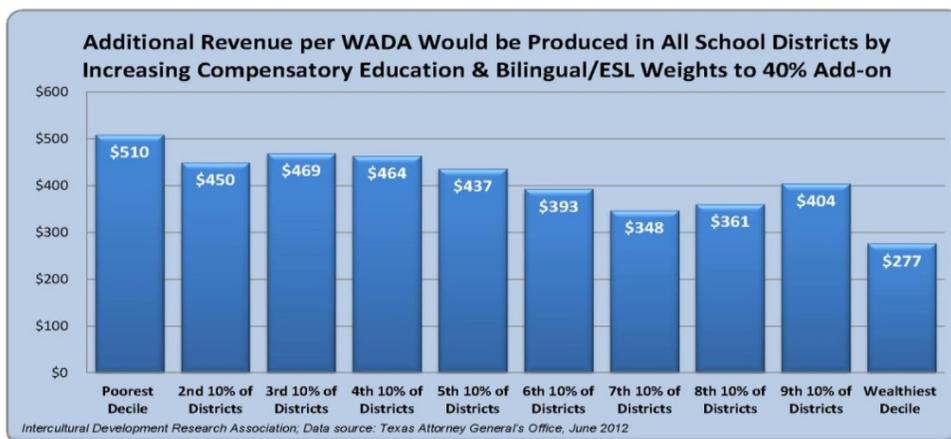
More than 50 cost studies have been conducted across the states. These studies range in terms of rigor and quality with each having their strengths and weakness from which Texas can pull. Several of them have considered the education of ED and EL students, but the way the studies approach underserved student population also can vary. In addition, IDRA is attaching as Appendix 2 a preliminary listing of EL/ED funding across the states.

Major Types of Education Cost Studies		
Type	Methodology	State Examples*
Cost-function	Determines how much a district would need to spend to reach a certain performance target, in light of particular student characteristics.	Arizona, California, Georgia, Kansas, Missouri, New York, Texas
Evidence-Based	Relies on a combination of effective schools research in tandem with expert panels to define and cost out “effective” educational practices.	Arizona, Arkansas, Kentucky, Maine, Maryland, New Jersey, North Dakota, Ohio, Oregon, Vermont, Washington, Wisconsin, Wyoming, Texas
Expert/Professional Judgment	Gathers input from groups of experienced education professionals (teachers, administrators, special program designers, etc.) and/or experts on the essential components necessary for a particular type of program, followed by collection of data on the actual dollar costs of those services. Often reviewed by panel of external experts.	Colorado Indiana, Kansas Kentucky, Maryland, Missouri, Montana Nebraska, New Mexico, North Dakota, Oregon, South Carolina, Washington, New York
Successful Schools/Districts	Based on data on existing school operations, followed by development of costs actually experienced in those settings.	Ohio, Mississippi, Illinois, Maryland, Kansas, Louisiana, Colorado, Missouri, New Hampshire, New York

*State examples derived in part from (Rebell, 2006).

Potential Impact of Basing Cost of Expert Research and Studies

The cost study findings could lead to much better support and meaningful opportunities for school children. In 2012, IDRA conducted an analysis of how much more revenue would be generated per WADA for school districts if the weights were increased to 0.40. The analysis below shows that school districts across Texas and their school children would benefit substantially.



This additional funding could help school districts provide a high quality education to all learners so long as the funding is carefully monitored. Some research-based examples of programs and services follow.

Research-Based Examples of Programs and Services	
Bilingual Education	Compensatory Education
Stipends for teachers and principals with bilingual and ESL certification	Stipends for teaching in schools with higher populations of ED students
Accelerated learning and high quality tutoring	Accelerated learning and high quality tutoring
Content-testing for new students first entering U.S. schools	Socio-economic school integration plans
Professional development for all teachers of EL students centered on language/content learning and cultural competency	Professional development for all teachers on cultural competency
Coaching and mentoring of teachers	Professional learning communities
Local monitoring programs to ensure bi-literacy and bilingualism	Block scheduling
Smaller class size	Smaller class size
Bilingual books, supportive materials and technology, and curriculum	Family engagement
High quality pre-K	High quality pre-K

In addition, if the weights increase as a result of the study, so too would school districts' WADA counts. Not only would this result in increased funding as noted above, but it would also provide more accurate property values per WADA for which state and local revenues are determined. Below is a very generic example of how more accurate WADA counts could affect a district's recapture.

Scenario I Recapture at Copper Penny level (\$319,500)

If I had 5,000 ADA and 20% EL and 60% ED, my WADA would be estimated at
1,000 EL x .1= 100 WADA
3,000 ED x .2= 600 WADA
Total= 5,700 WADA

If the Weights for the bilingual allotment and compensatory allotment increased to 0.25:

1,000 EL x .25= 250 WADA
3,000 ED x .25= 750 WADA
Total= 6,000 WADA

So if my property value was 400,000/WADA under the old weights, based on \$2,280,000,000 total property value (5700 WADA x 400,000), it would now be \$380,000 per WADA under the 0.25 weights (2,280,000,000/6,000).

My recapture at the copper level of \$319,500 would be reduced roughly 25% under this scenario (400,000-319,500/380,000).

IDRA thanks this committee for the opportunity to testify and stands ready as a resource. If you have any questions, please contact IDRA National Director of Policy, David Hinojosa, J.D., at david.hinojosa@idra.org or 210-444-1710, ext. 1739.

Resources

- Cortez, A. (2012). *Report of the Intercultural Development Research Association Related to the Extent of Equity in the Texas School Finance System and Its Impact on Selected Student Related Issues*, Prepared for the Mexican American Legal Defense and Educational Fund in *Texas Taxpayer & Student Fairness Coalition v. Williams*, No. D-1-GN-11-003130, Travis Co. District Court, (San Antonio, Texas: Intercultural Development Research Association).
- Dietz, J.K. (2004). *West-Orange Cove Consol. Indep. Sch. Dist. v. Neeley*, Findings of Fact and Conclusions of Law, 2004 WL 5719215 (Travis Co. Dist. Ct.).
- Jackson, C.K., & R. Johnson, C. Persico. (2016). "The Effects of School Spending on Educational and Academic Outcomes: Evidence from School Finance Reforms," *The Quarterly Journal of Economics*, 157-218 (Oxford University Press).
- Lafortune, J., & J. Rothstein, D. Whitmore Schanzenbach. (2016). *School Finance Reform and the Distribution of Student Achievement*, NBER Working Paper No. 22011 (National Bureau of Economic Research).
- Rebell, M. (2006). Costing Out Primer. Available at <http://schoolfunding.info/policy-research/costing-out-studies-2/overview/>.
- Robledo Montecel, M., & A. Cortez. (2008). "Costs of Bilingual Education," *Encyclopedia on Bilingual Education*, Vol. 1, 180-183.

The Intercultural Development Research Association is an independent, non-profit organization, led by María Robledo Montecel, Ph.D., dedicated to achieving equal educational opportunity for every child through strong public schools that prepare all students to access and succeed in college. IDRA strengthens and transforms public education by providing dynamic training; useful research, evaluation, and frameworks for action; timely policy analyses; and innovative materials and programs.

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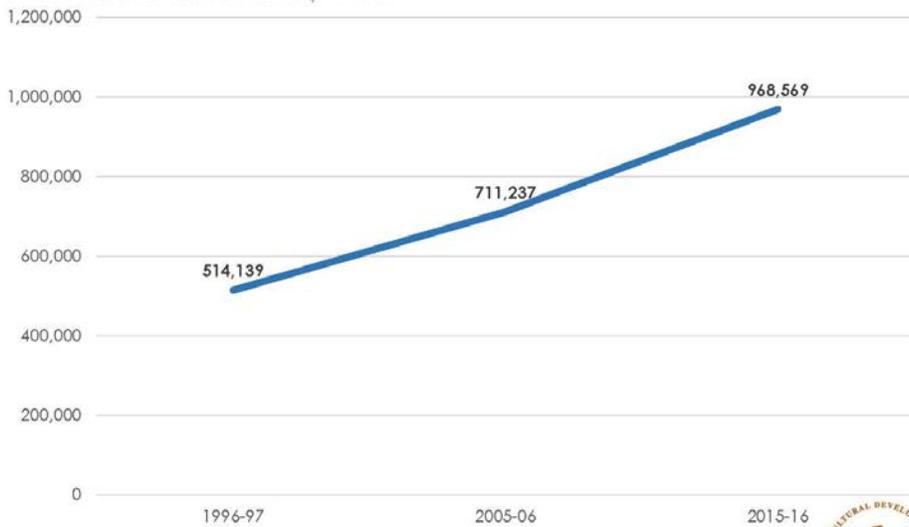
English Learner and Economically Disadvantaged Students in Texas – Demographics, Student Performance & Student Outcomes

House Public Education Committee Hearing –
Cost Studies for Bilingual and Compensatory Education Weights
March 7, 2017

David Hinojosa, J.D.
IDRA National Director of Policy



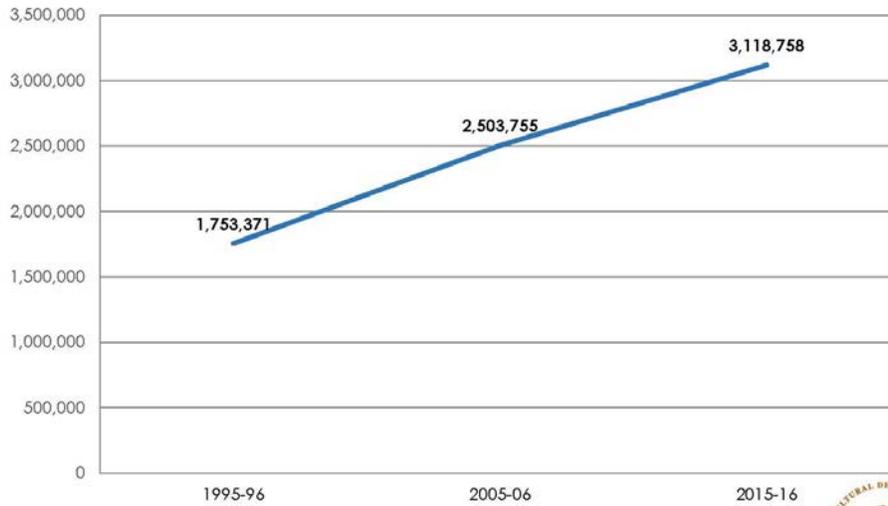
English Learner (EL) Enrollment in the State of Texas by Year



Source: Texas Education Agency, Academic Excellence Indicator System (AEIS), 1996-97, 2005-06
Source: Texas Education Agency, Texas Academic Performance Report (TAPR), 2015-16



Economically Disadvantaged (ED) Enrollment in the State of Texas by Year

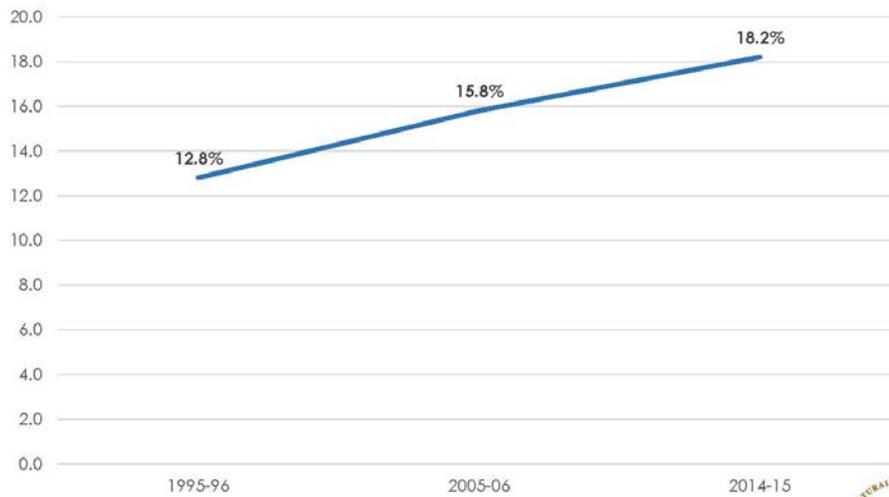


Source: Texas Education Agency, Academic Excellence Indicator System (AEIS), 1995-96, 2005-06
 Source: Texas Education Agency, Texas Academic Performance Report (TAPR), 2015-16



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Percent EL Enrollment by Year

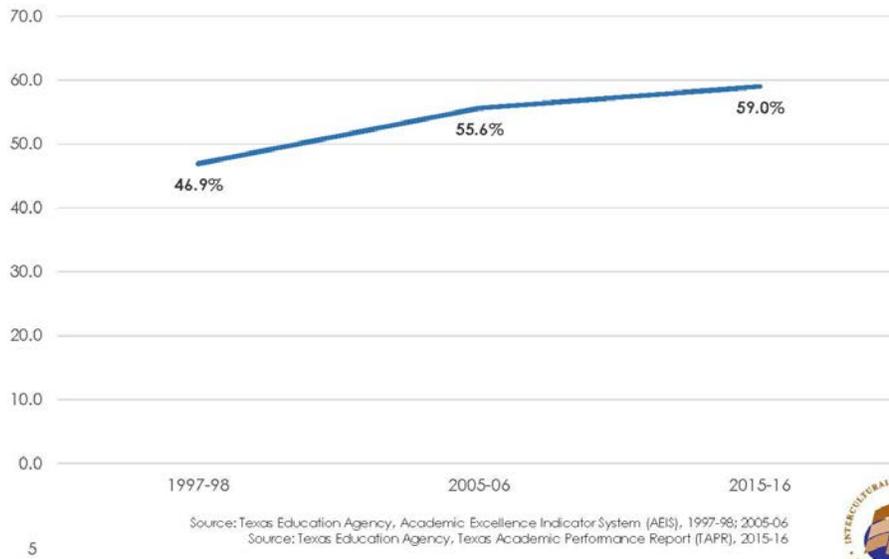


Source: Texas Education Agency, Academic Excellence Indicator System (AEIS), 1995-96, 2005-06
 Source: Texas Education Agency, Texas Academic Performance Report (TAPR), 2015-16

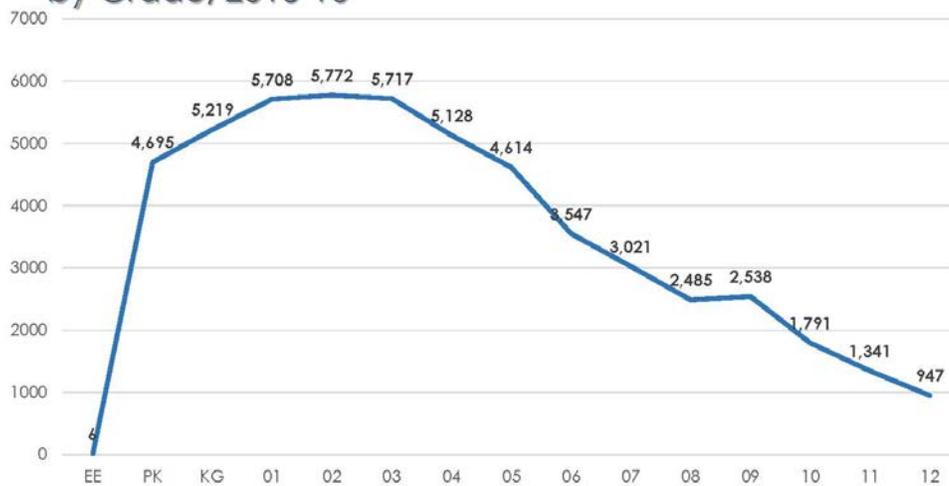


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Percent ED Enrollment by Year



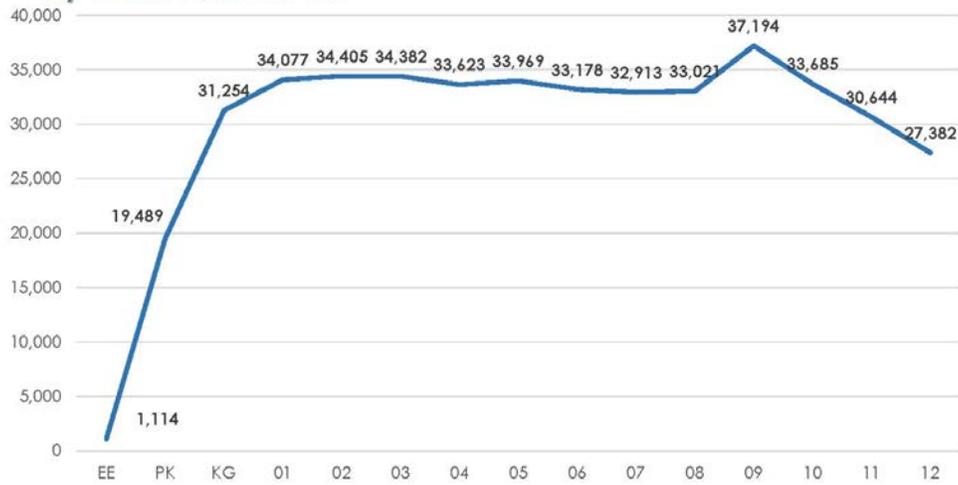
EL Enrollment in ESC Region 20 by Grade, 2015-16



Source: PEIMS Standard Reports, ELL Students by Category and Grade, 2015-16.



ED Enrollment in ESC Region 20 by Grade, 2015-16



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Source: Texas Education Agency, TAPR 2015-2016, Region 20: San Antonio.



Top Languages Spoken by ELs in Texas

State	
Language	Count
1. Spanish	885,460
2. Vietnamese	16,045
3. Arabic	10,623
4. English	8,312
5. Other (Unspecified)	6,250
6. Urdu	4,809
7. Mandarin (Chinese)	4,364
8. Burmese	3,605
9. Korean	2,798
10. Telugu (Telegu)	2,252

Source: PEIMS Standard Reports, ELL Students by Language and Grade, 2015-16.

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Percent at Level II Satisfactory Standard and Above: **STAAR Reading**, 2016

Grade	Non-ED	ED	Non-EL	EL
3	86	63	75	62
5	86	63	76	54
8	90	72	84	43

Source: Texas Education Agency, STAAR Summary Report-Combined, Spring 2016 *Non-ELL does not include monitored ELL

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Percent at Level II Satisfactory Standard and Above: **STAAR Math**, 2016

Grade	Non-ED	ED	Non-EL	EL
3	86	67	75	69
5	87	69	77	66
8	80	62	73	47

Source: Texas Education Agency, STAAR Summary Report-Combined, Spring 2016

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Percent at Level II Satisfactory Standard and Above: **STAAR Science, 2016**

Grade	Non-ED	ED	Non-EL	EL
5	85	64	75	58
8	84	64	77	42

Source: Texas Education Agency, STAAR Summary Report, May 2016 (combined)

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Percent at Level II Satisfactory Standard and Above: **STAAR Writing, Grades 4 and 7, 2016**

Grade	Non-ED	ED	Non-EL	EL
4	80	59	70	56
7	81	57	73	32

Source: Texas Education Agency, STAAR Summary Report, Spring 2016

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Percent at Level II Satisfactory Standard and Above: **STAAR Social Studies, 2016**

Grade	Non-ED	ED	Non-EL	EL
8	76	51	66	27

Source: Texas Education Agency, STAAR Summary Report Combined Summary, Spring 2016

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Percent at Level II Satisfactory Standard and Above: **STAAR End-of-Course, 2016**

Grade	Non-ED	ED	Non-EL	EL
English I	78	53	70	20
English II	80	55	73	17
Algebra I	89	75	83	60
Biology	95	87	93	70
U.S. History	97	91	95	73

Source: Texas Education Agency, STAAR EOC Summary Reports, Spring 2016 (Non-ELL does not incl ELL-Monitored)

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STAAR Percent at Postsecondary Readiness Standard, 2016

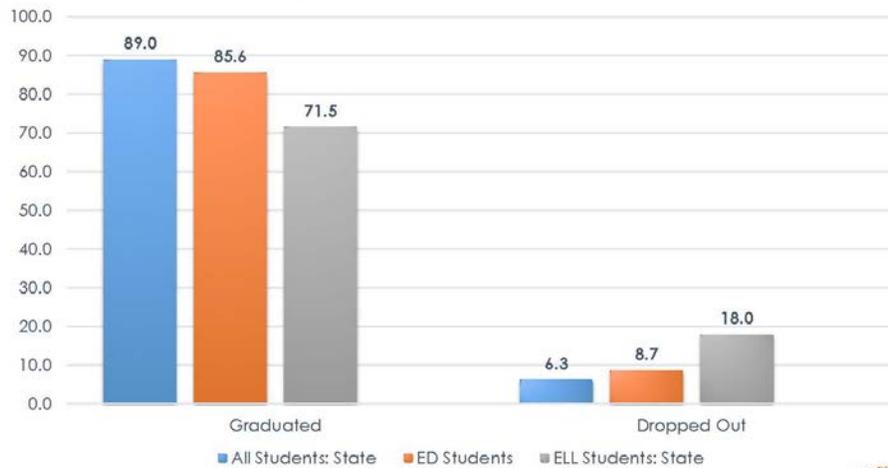
	State	ED	EL
Two or more subjects	45	32	19

Source: Texas Education Agency, Texas Academic Performance Report, 2015-16

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Four-Year Longitudinal Rate, Class of 2015



Source: Texas Education Agency, Texas Academic Performance Report, 2015-16

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Appendix 2: Preliminary Listing of EL/ED Funding, State Comparison

State	Weight Target (ED/EL)	Weight Amt (ED)	Weight Amt (ELL)	Weight Multiplier/Qualifying Basis
Alabama	ED/ELL			Based on prior year ESL allocations; categorical aid
Alaska	ELL		0.2	Foundation
Arizona	ED/ELL		0.115	Foundation
Arkansas	ELL	Categorical funding formulas	\$305 per pupil	State appropriation
California	ED/ELL		0.2	Foundation and added entitlement formulas
Colorado	ED			Categorical funding
Connecticut	ED/ELL		0.15	Foundation
Delaware	ED/ELL			Unit for Academic Excellence funding- not targeted
Florida	ELL		0.147	Foundation
Georgia	ED/ELL	0.3092-1.4717	2.5068	Foundation- ED funding varies between remedial and alternative education; ELL funding based on ESOL program enrollment
Hawaii	ED/ELL	0.1	0.18	Foundation, and formula based on combined district cost and modified allowable growth
Idaho	ELL		\$263 per pupil	State appropriation and additional district grants
Illinois	ED/ELL			Grants formula funding
Indiana	ED/ELL			Grants formula funding
Iowa	ED/ELL		0.22	Grant formula for ED/ ELL Foundation weight
Kansas	ED/ELL	0.456	0.395	Foundation and formulas
Kentucky	ED	0.15	0.096	Foundation
Louisiana	ED/ELL	0.22	0.22	Foundation
Maine	ED/ELL	0.15	0.525-0.7	Foundation, ELL weight depending on density
Maryland	ED/ELL			Grants formula funding
Massachusetts	ED/ELL	\$2,767-3,422 per pupil	\$637-2,325 per pupil	Foundation
Michigan	ED/ELL	0.115	\$1.2M State appropriation distributed per pupil	Foundation and annual cap/Biennium budget
Minnesota	ED/ELL	1.00 (free lunch) & 0.5 (reduced)	\$700 per pupil times the greater of 20 or the number of eligible ELLs	Foundation, and formula of concentration of FRL students on a campus
Mississippi	ED	0.05		Foundation
Missouri	ED/ELL	0.25	0.6	Foundation
Montana	ED			Limited appropriation

Nebraska	ED/ELL	.05-0.3	0.25	Foundation
Nevada	ELL		\$24.95 M	State appropriation
New Hampshire	ELL	\$1,749.15 per pupil add'l	\$684.45 per pupil	Additional to state allotment
New Jersey	ELL	0.47-0.57	0.5	Foundation
New Mexico	ELL		0.5	Foundation
New York	ED/ELL		0.5	Cost index funding/Foundation
North Carolina	ED/ELL	\$200 per pupil		Formula funding
North Dakota	ELL	0.025	0.2-0.3	Foundation, depending on ELL student language ability
Ohio	ED/ELL	\$269 calculated with poverty index		Formula funding for ED/ELL
Oklahoma	ED/ELL	0.25	0.25	Foundation
Oregon	ED/ELL	0.25	0.5	Foundation
Rhode Island	ED	0.4		Foundation
South Carolina	ED	\$79.55M	0.2	State appropriation and formula weights
South Dakota			0.25	Foundation
Tennessee	ED/ELL			Formula funding and teacher ratios
Texas	ED/ELL	0.2	0.1	Foundation
Utah	ELL	\$1.2M		State appropriation for at-risk students
Vermont	ED/ELL	0.25	0.45	Foundation
Virginia	ED/ELL			State payments
Washington	ED/ELL	\$460 per pupil	\$885.91 per pupil	Additional to state allotment based on formulas
Wisconsin	ED/ELL	\$109.2 M	\$8.6 M	Biennium Categorical aid
Wyoming	ED/ELL			Formula funding for state restricted grants

Source: Verstegen, D. (2011). *Public education finance systems in the United States and funding policies for populations with special educational needs*. *Education Policy Analysis Archives*, 19(21), 1-30.

Source: IDRA, 2012. "Report of the Intercultural Development Research Association Related to the Extent of Equity in the Texas School Finance System and Its Impact on Selected Student Related Issues."

Source: Rolle, A. and Jimenez-Castellanos, O. (2014). *An efficacy analysis of the Texas school funding formula with attention to English Language Learners*. *Journal of Education Finance*, 39(3), 203-221.

Source: Verstegen, D. (2015). *A 50-state survey of school finance policies*. <https://schoolfinancesdav.wordpress.com/>. Retrieved 6 Mar 2017.

Source: Millard, M. (2015). *State funding mechanisms for English language learners*. *Education Commission of the States*, <http://www.ecs.org/clearinghouse/01/16/94/11694.pdf>. Retrieved 6 Mar 2017.