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Funding Formula Implementation Profile: Illinois

Interviewee Information:

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Background: In FY 18, the Illinois State Board of Education (ISBE) adopted an evidence-based funding (EBF) formula which is based on the theory that there are a number of evidence-based practices, resources, and models that, if deployed with fidelity, will increase student outcomes. An adequacy target is calculated by taking into account 34 cost factors including English language learner (ELL), low-income, and special education populations, as well as regional variances and costs. The 34 factors were adopted from Odden and Picus's Evidence-Based Funding approach. The adequacy target serves as the denominator in the ratio. The numerator is then calculated by adding the prior year's allocation and local funding. Once the ratio is determined, districts are placed in 1 of 4 tiers:

- Tier 1 – Below 67% (values vary slightly from year to year according to appropriations)
- Tier 2 – Above 67% to 89.99%
- Tier 3 – 90% to less than 100%
- Tier 4 – at or above 100%

Under the new formula, most of the new money goes to tier 1 and 2 districts. Each year, the distribution is reset, essentially increasing each district's hold harmless amount. There is a hold harmless provision in place to ensure that no LEA gets less than the year before. Categorical weights for low-income, special education, and ELL students are also included in the adequacy targets. ISBE maintains a calculation of how much of the total funding is attributable to the additional weights for these populations.

Intent: The main goal of the funding formula was to create more equity within the state. The previous foundation-based funding model was found to be susceptible to economic downturns, having the greatest impact on low-income areas. ISBE staff reported that both autonomy and accountability were secondary values. The formula creates a measuring stick of the adequacy target, and local municipalities and the state are held accountable by that metric for how much they fund their schools. The funding system also creates opportunities for autonomy for LEAs since ISBE does not mandate particular programs or strategies or for money to be spent to serve particular students (with the exception of categorical weights).

Support and Training for LEAs: ISBE provided a series of professional development opportunities and various materials for LEA staff so they might better understand the formula, covering topics about how targets are constructed, how local contributions are determined, and how ISBE plans to distribute new funds as they become available. ISBE is continuing to produce resources to support LEAs as changes occur.

A 28-member professional review panel is statutorily required to assess and advise on the funding formula's implementation, results, and scope.

Reporting: Each LEA is required to submit an evidence-based spending plan in September of each year. LEAs also submit enrollment data and ELL participation data on October 1 and March 1 through a statewide student information system. Allocations are created based on the average of the October 1 and March 1 student



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counts. Student counts for low-income weights are collected from the Department of Human Services based on participation in social programs targeted at low-income families. ISBE receives data from the department of revenue for tax rates and equalized assessed values for districts.

ISBE only collects expenditure data regarding ELL services and these data are submitted through an internal web-based expenditure reporting system, which is utilized for all other grant reporting. ISBE does not collect general expenditure data.

Monitoring: ISBE publishes detailed information on how evidence-based funding allocations are calculated, as well as the adequacy level of each LEA. LEAs often use this adequacy calculation as a comparison benchmark. ELL expenditure data and spending plans are not published.

Measuring Success: ISBE specifically noted that 80% of students in the state are still less than adequately funded and that the state would need to infuse \$4.5 billion to reach each LEA's adequacy target. However, 89 cents of every new dollar goes directly to LEAs that are furthest from their adequacy target, so there is overall a more equitable distribution of money than there was before. Also, anecdotal and qualitative evidence exists to show that the districts are increasing their capacity to deploy the recommended evidence-based strategies and take advantage of the flexibility afforded to them.

Lessons Learned/Advice:

- There is a learning curve when adopting a new funding formula. Districts and the public need to “unlearn” practices and pre-conceptions about the previous funding formula, and there is significant support needed to ensure the funding formula can achieve its intent.
- While a hold harmless provision can significantly slow down the equitable distribution of funds, it can also create stability for districts and allow them to focus on strategic uses of new funding.
- Implementation of a new formula should be paced slowly — run models, create solid communications to avoid the spread of misinformation, and ensure the accuracy of legislation before it is passed.
- Create stakeholder advisory groups to help solidify buy-in and understanding from LEAs, as well as get critical input on implementation.
- Take every opportunity to connect the school funding formula with the ESSA Site-Based Expenditure Reporting Requirement.

Additional Resources:

Main EBF Calculation page: <https://www.isbe.net/ebfdist>

EBF Basics: <https://www.isbe.net/Documents/EBF-Basics-Fall-2019.pdf>

EBF Detailed Calculations: https://www.isbe.net/Documents/EBF_Presentation_Detailed.pdf



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Appendix:

Full FY 20 EBF Calculation: <https://www.isbe.net/Pages/ebfdistribution.aspx>

District FY 20 Evidence-Based Funding Results

Click on the yellow cell to select your district ID (RCDT) from the drop down list.
If you do not know your district's RCDT you can find it in the Base Calc Tab.

District Name		District Type
Average Student Enrollment		Adequacy Target
Final Resources	<i>Final Resources / Adequacy Target = Percent of Adequacy</i>	Percent of Adequacy
Tier Assignment		Tier Funding
FY 19 Base Funding Minimum	<i>Base Funding Minimum + Tier Funding = Gross State Contribution</i>	Gross State Contribution

If you do not wish to view the full calculation you can view your district specific information by selecting your RCDT from the drop down list by clicking on the yellow cell.

Otherwise, you may view your district's full calculation information by navigating through the tabs at the bottom of this file beginning with the Base Calc Tab.



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FY 2020 Evidence-Based Funding Expenditure Allocation Requirements for Additional Investments:

https://www.isbe.net/Documents/EBF_Presentation_Detailed.pdf

Illinois State Board of Education

FY 2020 Evidence-Based Funding Expenditure Allocation Requirements for Additional Investments

Amounts Listed Are Provided in Addition to and Not in Lieu of All Other Funding of Cost Factors

Per 105 ILCS 5/18-8.15

Prepared by State Funding & Forecasting Staff, August 2019

District ID	District Name	Organization Type	Total Allocation of Sp Ed Funds from FY 19 State Contribution	Total Allocation of EL Funds from State Contribution	Total Allocation of Low-Income Funds from State Contribution	Total Allocation of Technology Costs for Tier 1 and Tier 2 Funds from State Contribution	Rep No.	Sen No.
010000000092	ALT SCH-ADAMS/PIKE ROE (Was 46)	Regional	\$ 904.87	\$ -	\$ 2,017.94	\$ -	100	50
010000000093	SAFE SCH-ADAMS/PIKE ROE	Regional	\$ 6,257.79	\$ -	\$ 13,705.38	\$ -	94	47
0100100102600	PAYSON COMM UNIT SCHOOL DIST 1	Unit	\$ 173,467.35	\$ 278.94	\$ 212,927.33	\$ 2,521.27	94	47
0100100202600	LIBERTY COMM UNIT SCHOOL DIST 2	Unit	\$ 229,817.82	\$ -	\$ 95,186.51	\$ 933.66	94	47
0100100302600	CAMP POINT C U SCHOOL DIST 3	Unit	\$ 238,614.92	\$ -	\$ 357,121.68	\$ 2,061.76	94	47
0100100402600	COMMUNITY UNIT SCHOOL DIST 4	Unit	\$ 232,381.04	\$ 294.46	\$ 138,638.40	\$ 1,314.29	94	47
0100117202200	QUINCY SCHOOL DISTRICT 172	Unit	\$ 2,370,396.44	\$ 1,002.35	\$ 5,106,355.05	\$ 8,070.18	94	47
0100500102600	BROWN COUNTY C U SCH DIST 1	Unit	\$ 206,280.46	\$ 28.96	\$ 279,631.56	\$ 559.80	93	47
0100901502600	BEARDSTOWN C U SCH DIST 15	Unit	\$ 587,741.36	\$ 556,198.11	\$ 1,560,293.92	\$ 14,232.85	93	47
0100906402600	VIRGINIA C U SCH DIST 64	Unit	\$ 45,367.38	\$ -	\$ 132,694.89	\$ 404.44	93	47
0100926202600	A C CENTRAL CUSD 262	Unit	\$ 86,807.61	\$ 3.15	\$ 115,630.30	\$ 442.03	93	47
0106900102600	FRANKLIN C U SCHOOL DISTRICT 1	Unit	\$ 98,212.55	\$ -	\$ 75,802.34	\$ 245.76	100	50
0106900602600	WAVERLY C U SCHOOL DIST 6	Unit	\$ 105,102.98	\$ 153.58	\$ 146,170.93	\$ 301.57	100	50
0106901102600	MEREDOSIA-CHAMBERSBURG CUSD 11	Unit	\$ 71,199.10	\$ -	\$ 203,687.44	\$ -	100	50
0106902702600	TRIOPIA C U SCHOOL DISTRICT 27	Unit	\$ 109,449.39	\$ -	\$ 69,265.16	\$ 505.31	100	50
0106911702200	JACKSONVILLE SCHOOL DIST 117	Unit	\$ 1,298,998.00	\$ 54,156.09	\$ 3,077,940.43	\$ 6,074.65	100	50
0107500302600	PLEASANT HILL C U SCH DIST 3	Unit	\$ 127,086.51	\$ -	\$ 137,959.30	\$ 1,422.29	100	50
0107500402600	GRIGGSVILLE-PERRY C U SCH DIST 4	Unit	\$ 146,423.83	\$ -	\$ 269,242.05	\$ 430.00	100	50
0107501002600	PIKELAND C U SCH DIST 10	Unit	\$ 505,966.43	\$ 45.73	\$ 784,055.13	\$ 3,521.72	100	50
0107501202600	WESTERN CUSD 12	Unit	\$ 155,130.58	\$ -	\$ 398,525.70	\$ 931.84	100	50
0108600102600	WINCHESTER C U SCH DIST 1	Unit	\$ 240,614.83	\$ -	\$ 270,432.24	\$ 1,371.52	100	50
0108600202600	SCOTT-MORGAN C U SCHOOL DIST 2	Unit	\$ 71,309.67	\$ 26.63	\$ 188,515.81	\$ 1,516.80	100	50
030000000092	ALT SCH-BOND/EFFINGHAM/FAYETTE RO	Regional	\$ 4,321.64	\$ -	\$ 8,890.78	\$ -	115	58
030000000093	SAFE SCH-BOND/EFFINGHAM/FAYETTE R	Regional	\$ 128.64	\$ -	\$ 249.27	\$ -	107	54
0300300102600	MULBERRY GROVE C U SCH DIST 1	Unit	\$ 137,296.37	\$ -	\$ 235,376.26	\$ 2,347.10	107	54
0300300202600	BOND CO C U SCHOOL DIST 2	Unit	\$ 582,756.12	\$ 394.50	\$ 832,678.79	\$ 8,628.54	107	54
0301100102600	MORRISONVILLE C U SCH DIST 1	Unit	\$ 44,618.77	\$ -	\$ 118,595.33	\$ 326.94	95	48
0301100302600	TAYLORVILLE C U SCH DIST 3	Unit	\$ 388,140.50	\$ 35.53	\$ 1,686,161.56	\$ 4,097.59	95	48
0301100402600	EDINBURG C U SCH DIST 4	Unit	\$ 37,820.65	\$ -	\$ 74,615.38	\$ 212.93	96	48