



**MEMORANDUM**

June 5, 2015

**To:** Senator Richard Burr  
Attention: Chris Toppings

**From:** Rebecca Skinner, Specialist in Education Policy, 7-6600

**Subject:** **Estimated FY2015 Grants Under Title I-A of the Elementary and Secondary Education Act to Local Educational Agencies and States Assuming All Funds Are Allocated Using the Education Finance Incentive Grant Formula Only, and Updated Quintiles for Weighted Child Counts Are Used, the National Average Per Pupil Expenditure Is Used as the Expenditure Factor for all States, the Effort Factor Is Removed, a Cap Is Placed on Puerto Rico's Grant Amount, and a 20% Formula Child Rate Threshold Is Applied for the Upper Quintiles on the Number-Based Formula Child Weighting Scale**

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This memorandum has been prepared in response to your request for an analysis of proposed changes to formulas used to allocate funds under Title I-A of the Elementary and Secondary Education Act (ESEA).<sup>1</sup> More specifically, you requested an analysis of changes to estimated local educational agency (LEA) and state FY2015 Title I-A grants assuming six changes were made to the Title I-A formulas. First, you requested that all Title I-A funds available for grants to states and LEAs be provided only through the Education Finance Incentive Grant (EFIG) formula as opposed to providing funds through the four formulas included in statutory language. Second, you requested that funds distributed through the EFIG formula use “formula child” quintiles that have been updated to include roughly 20% of all children included in the determination of estimated FY2015 Title I-A grants in each quintile. Third, you requested grants be calculated using the national average per pupil expenditure (APPE) as the expenditure factor for all states, the District of Columbia, and Puerto Rico in the EFIG formula. Fourth, you requested that the EFIG effort factor included in current law not be used in the calculation of the grant. Fifth, you requested that the funding for Puerto Rico be capped at Puerto Rico’s estimated FY2015 share of funds available for state grants based on current law. Sixth, you requested that all LEAs must have a formula child rate at or above 20% to benefit from the weights in the 4<sup>th</sup> and 5<sup>th</sup> quintiles of the numbers-based formula child weighting scale used for determining grants under the EFIG formula. This memorandum examines the results of making all six changes concurrently. Per your request, no background information on the Title I-A formulas has been provided. Given the general interest in this topic, CRS may provide some or all of the information contained in this memorandum to other congressional requesters.

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<sup>1</sup> Leah Rosenstiel and Elizabeth Crowe, Research Assistants at CRS, also contributed to this memorandum.

## Methodology

The estimated FY2015 Title I-A grant amounts under current law were calculated by the U.S. Department of Education (ED) and all other estimated grant amounts were calculated by CRS using the most current data available. In instances where data needed by ED or CRS to calculate estimated FY2015 Title I-A grants were not yet available, both ED and CRS used data that were used to calculate FY2014 Title I-A grant amounts instead.<sup>2</sup> The remainder of this section discusses each of the requested changes to the Title I-A formula and associated methodological issues.

Please note that the FY2015 estimated grants are provided solely to assist in comparisons of the relative impact of alternative formulas and funding levels in the legislative process. They are not intended to predict specific amounts that LEAs or states will receive.

### EFIG Formula

In order to estimate FY2015 grants using only the EFIG formula, it was assumed that the hold harmless grant amounts for LEAs would be based on the total amount of Title I-A funds the LEA received under all four Title I-A formulas in FY2014. In addition, it was assumed that the current eligibility requirements to receive funding under EFIG would continue to apply. Thus, the 583 LEAs that meet the requirements for Basic Grants only or that would qualify only for a Concentration Grant based on the four-year hold harmless provisions did not receive any funds under the funding scenario examined in this memorandum.<sup>3</sup>

It should be noted that unlike the other Title I-A formulas, grants under the EFIG formula are allocated first to the states and then to the LEAs within each state. Under EFIG, a state grant amount is affected by the formula child count within the state relative to the formula child count in other states. Subsequently, LEAs within each state compete for grants against other LEAs in the state, and these grants are determined, in part, based on how an LEA's formula child count compares to that of other LEAs in the same state. Under the other three Title I-A formulas, grants are initially determined at the LEA level, so each LEA competes for funding against all other LEAs nationwide.

### Quintiles

Quintiles were constructed that include roughly 20% of all children included in the determination of FY2015 Title I-A grants in each quintile. These children are commonly referred to as formula children. The formula child rate is the percentage of children ages 5-17 residing in a given LEA<sup>4</sup> who are formula children. It is calculated by dividing the number of formula children in an LEA by the number of children ages 5-17 who reside in the LEA. This is the same methodology that was used to calculate the quintiles

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<sup>2</sup> For example, final population data for children living in foster homes needed to calculate FY2015 grants will not be available until later this year.

<sup>3</sup> There are minimum eligibility requirements that LEAs must meet to receive a Title I-A grant. Under current law, to receive funding under Basic grants, an LEA must have at least 10 formula children and these children must account for more than 2% of the children ages 5-17 in the LEA. For Concentration grants, an LEA must be eligible for a Basic Grant and must have more than 6,500 formula children or formula children must account for more than 15% of the children ages 5-17 in the LEA. For both Targeted grants and Education Finance Incentive Grants (EFIG), an LEA must have at least 10 formula children and these children must account for at least 5% of all the children ages 5-17 in the LEA.

<sup>4</sup> This child count is determined based on data from the Census Bureau's Small Area Income and Poverty Estimates (SAIPE) program.

that are demarcated in current law. The new quintiles, however, are based on the most current distribution of formula children in FY2015 as opposed to the distribution of formula children at the time the No Child Left Behind Act (NCLB; P.L. 107-110) was being considered. For the purposes of this memorandum, the new quintiles are referred to as the updated quintiles.

The formula child population used to determine Title I-A grants for the 50 states, the District of Columbia and Puerto Rico consists of children ages 5 to 17 (a) in poor families, according to estimates for a recent income year for local educational agencies (LEAs) from the Census Bureau's Small Area Income and Poverty Estimates (SAIPE) program; (b) in institutions for neglected or delinquent children or in foster homes; and (c) in families receiving Temporary Assistance for Needy Families (TANF) payments above the poverty income level for a family of four (hereafter referred to as TANF children). Children in poor families account for about 97% of the total formula child count. For the purposes of this analysis, all formula children were included regardless of whether they were in an LEA that received a Title I-A grant or not. In other words, some LEAs that have formula children do not receive Title I-A grants.

The updated quintiles were determined using the most current Title I-A data available for calculating FY2015 grants. While the poverty data that will be used to determine FY2015 Title I-A grants are available, counts of neglected, delinquent, foster, and TANF children are not yet available. In these instances, data that were used to calculate FY2014 Title I-A grants were used in CRS calculations instead.<sup>5</sup> Overall, there were 11.6 million formula children included in the analysis.

There are slight variations in the number of formula children per updated quintile as an individual LEA must be fully included in a single quintile. That is, the formula children in a given LEA were not divided between multiple quintiles. In addition, each updated quintile contains a different number of LEAs, as the quintiles were established based on the number of formula children and not on the number of LEAs.

The changes to the quintiles used for weighted child counts for determining grant amounts under the EFIG formula based on the number of eligible children and based on the percentage of eligible children are shown in **Tables 1** and **2**, respectively.

**Table 1. Updated Quintiles for Weighted Child Counts Based on the Number of Eligible Children**

Population Ranges in Current Law	Proposed Population Ranges Based on Updated Quintiles
0 - 691	0 - 832
692 - 2,262	833 - 2,641
2,263 - 7,851	2,642 - 7,656
7,852 - 35,514	7,657 - 26,704
35,515 or more	26,705 or more

**Source:** Table prepared by CRS, June 5, 2015, based on CRS analysis of current law and unpublished data provided by the U.S. Department of Education, Budget Service.

<sup>5</sup> In addition, other data needed to calculate FY2015 Title I-A grants are not yet available. For example, final state average per pupil expenditure (APPE) data needed to calculate FY2015 grants will not be available until later this year.

**Table 2. Updated Quintiles for Weighted Child Counts Based on the Percentage of Eligible Children**

Population Ranges in Current Law	Proposed Population Ranges Based on Updated Quintiles
0 - 15.58%	0 – 17.33%
More than 15.58% - 22.11%	More than 17.33% - 23.55%
More than 22.11% - 30.16%	More than 23.55% - 29.09%
More than 30.16% - 38.24%	More than 29.09% - 36.11%
Above 38.24%	Above 36.11%

**Source:** Table prepared by CRS, June 5, 2015, based on CRS analysis of current law and unpublished data provided by the U.S. Department of Education, Budget Service.

### Expenditure Factor

The expenditure factor is used in the calculation of initial grant amounts in the four Title I-A grant formulas before state minimum and hold harmless provisions are applied. Under current law, the state expenditure factor is determined using the state average per pupil expenditure (APPE) for public K-12 education. For EFIG, state APPE is subject to a minimum of 85% and a maximum of 115% of the national APPE. That is, if a state’s APPE is less than 85% of the national APPE, the state’s APPE is automatically raised to 85% of the national APPE. If a state’s APPE is more than 115% of the national APPE, the state’s APPE is automatically reduced to 115% of the national APPE.<sup>6</sup> After adjustments, should they be needed, a state’s APPE is multiplied by 0.40 as specified in statute. The expenditure factor is the same for all LEAs in the same state.

In order to estimate the FY2015 grants using the national APPE as the expenditure factor for all states, the national APPE was multiplied by 0.40. This figure was then used as the expenditure factor for all states in the EFIG formula. Using the national APPE as the expenditure factor for every state is essentially the same as multiplying all of the initial grant amounts by 1. The proposed change therefore eliminates the effect of state APPE in determining Title I-A grants.

### Effort Factor

The effort factor is used in the calculation of initial state grant amounts in the EFIG formula before state minimum provisions are applied. Under current law, the effort factor is a ratio of the three-year average APPE for public elementary and secondary education to the three-year average state personal income per capita (PCI) divided by the ratio of the three-year average national APPE to the three-year average national PCI. The effort factor ratio is:

$$\text{Effort} = \frac{\text{APPE}_{\text{State}} / \text{PCI}_{\text{State}}}{\text{APPE}_{\text{National}} / \text{PCI}_{\text{National}}}$$

<sup>6</sup> State APPE is subject to a minimum of 80% and a maximum of 120% of the national APPE for Basic, Concentration, and Targeted Grants. That is, if a state’s APPE is less than 80% of the national APPE, the state’s APPE is automatically raised to 80% of the national APPE. If a state’s APPE is more than 120% of the national APPE, the state’s APPE is automatically reduced to 120% of the national APPE.

The resulting index number is greater than 1.0 for states where the ratio of expenditures per pupil for public elementary and secondary education to PCI is greater than the average for the nation as a whole, and below 1.0 for states where the ratio is less than average for the national as a whole. Narrow bounds of 0.95 and 1.05 are placed on the resulting multiplier, so that its influence on state grants is rather limited and its importance is largely symbolic. The effort factors are the same for all LEAs in the same state.

In order to estimate the FY2015 grants without the effort factor, the factor was removed from the initial state grant calculations under the EFIG formula.

## Cap on Puerto Rico

Puerto Rico's grant is capped at the percentage amount that Puerto Rico is estimated to receive, relative to other states, in FY2015 under current law. The percentage of Puerto Rico's grant is calculated by dividing the amount Puerto Rico received in FY2015 by the total amount available to states for FY2015. The grant for Puerto Rico under the scenario considered in this memorandum is then calculated by multiplying the total amount available to states by this percentage. This means that in years when the amount available to states increases Puerto Rico's grant would increase, but its percentage share of the total would remain the same as it was in FY2015. Similarly, when the amount available to states remains constant, as it does under the proposed changes, Puerto Rico's grant would remain the same as it was in FY2015. If the overall level of funding available to states were to decrease in a subsequent year, however, the amount of funding provided to Puerto Rico would also decrease.

## Formula Child Rate Threshold

Under the EFIG formula, the formula child population count is weighted for the determination of grants to LEAs. In general, children counted in the formulas are assigned weights on the basis of (1) each LEA's formula child rate (commonly referred to as percentage weighting) and (2) each LEA's number of formula children (commonly referred to as number weighting). Under both percentage weighting and number weighting, a weighted formula child count is produced. As shown in **Tables 3 and 4**, under current law, there are five sets of weights that apply to an LEA's formula child count and percentage of formula children. These weights correspond to the formula child quintile ranges discussed previously.

The weights are applied under number weighting and under percentage weighting in a stepwise manner to all LEAs nationwide to produce two weighted child counts (one under each weighting system). The higher of the two weighted formula child counts for a given LEA is then used in the formulas for determining grants. Of the LEAs for which ED calculates grants under the EFIG formula, about 88% of the LEAs have higher weighted formula child counts based on the formula child rates than based on their number of formula children for FY2015. That is, 88% of LEAs receiving grants under the EFIG formula use the percentage-based rather than the numbers-based weighting scale.

You requested that all LEAs must have a formula child rate at or above 20% to benefit from the weights in the 4<sup>th</sup> and 5<sup>th</sup> quintiles on the numbers-based formula child weighting scale. That is, for LEAs that have a formula child rate at or above 20%, the numbers-based weighted formula child counts would continue to be determined using the formula child weights for the numbers-based scale under current law. For LEAs that have a formula child rate below 20%, the numbers-based weighted formula child counts would be determined using only the weights in the first three quintiles on the numbers-based scale. More specifically, the highest weight on the numbers-based weighting scale that could be assigned to an LEA with a formula child rate below 20% would be the weight currently ascribed to the 3<sup>rd</sup> quintile under current law. No changes were made to the weights on the percentage-based formula child weighting scale.

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As under current law, the higher of the weighted formula child count under the proposed numbers-based scale and the weighted formula child count under the percentage-based scale for a given LEA was then used in the EFIG formula for determining estimated grants.

As previously discussed, in addition to the formula child weight threshold, you requested that quintiles used for weighted child counts be updated. Both sets of proposed changes to the EFIG numbers-based and percentage-based weighting scales are shown in **Tables 3** and **4**, respectively.

Under the proposed change to the weighting scale, only LEAs that benefit from the formula child weights in the updated 4<sup>th</sup> and 5<sup>th</sup> quintiles on the numbers-based weighting scale and have an estimated formula child rate below 20% would see a change in their weighted student counts. Of the LEAs for which ED calculates grants under the EFIG formula, 32 LEAs (0.26%) meet the aforementioned criteria.

It should be noted that under the EFIG formula, the weighted formula child counts are only used in the calculation of LEA grants. As grants under the EFIG formula are first calculated at the state level, changing the weighting system will have no effect on EFIG state grant amounts.<sup>7</sup> There would, however, be changes to grants at the LEA level.

**Table 3. Weights Assigned Based on Formula Child Counts Under Current Law and the Proposed Changes for the Calculation of Education Finance Incentive Grants**

State Equity Factor Range <sup>a</sup>	Current Law		Proposed Changes		
	Population Ranges	Weights	Population Ranges	Weights for LEAs with a Formula Child Rate Below 20%	Weights for LEAs with a Formula Child Rate At or Above 20%
0 – 0.10	0 - 691	1.0	0 - 832	1.0	1.0
	692 - 2,262	1.5	833 – 2,641	1.5	1.5
	2,263 - 7,851	2.0	2,642 – 7,656	2.0	2.0
	7,852 - 35,514	2.5	7,657 – 26,704	2.0	2.5
	35,515 or more	3.0	26,705 or more	2.0	3.0
0.10 – 0.20	0 - 691	1.0	0 - 832	1.0	1.0
	692 - 2,262	1.5	833 – 2,641	1.5	1.5
	2,263 - 7,851	2.25	2,642 – 7,656	2.25	2.25
	7,852 - 35,514	3.375	7,657 – 26,704	2.25	3.375
	35,515 or more	4.5	26,705 or more	2.25	4.5
Above 0.20	0 - 691	1.0	0 - 832	1.0	1.0
	692 - 2,262	2.0	833 – 2,641	2.0	2.0

<sup>7</sup> Unlike the other Title I-A formulas, grants under the EFIG formula are allocated first to the states and then to the LEAs within each state. Under EFIG a state grant amount is affected by the formula child count within the state relative to the formula child count in other states. Subsequently, LEAs within each state compete for grants against other LEAs in the state, and these grants are determined, in part, based on how an LEA's formula child count compares to that of other LEAs in the same state. Under the other three Title I-A formulas, grants are initially determined at the LEA level, so each LEA competes for funding against all other LEAs nationwide.

State Equity Factor Range <sup>a</sup>	Current Law		Proposed Changes		
	Population Ranges	Weights	Population Ranges	Weights for LEAs with a Formula Child Rate Below 20%	Weights for LEAs with a Formula Child Rate At or Above 20%
	2,263 - 7,851	3.0	2,642 – 7,656	3.0	3.0
	7,852 - 35,514	4.5	7,657 – 26,704	3.0	4.5
	35,515 or more	6.0	26,705 or more	3.0	6.0

**Source:** Table prepared by CRS, June 5, 2015, based on CRS analysis of current law and unpublished data provided by the U.S. Department of Education (ED), Budget Service.

- a. The proposed changes have no effect on the state equity factor or the state equity factor ranges used to determine weighted formula child counts. Each state’s equity factor is determined based on variations in average per pupil expenditures among the LEAs in the state.

**Table 4. Weights Assigned Based on the Percentage of Formula Children Under Current Law for the Calculation of Education Finance Incentive Grants**

State Equity Factor Range <sup>a</sup>	Percentage Ranges in Current Law	Percentage Ranges Under the Proposed Changes	Weights Under Current Law and Proposed Changes
0 – 0.10	0 - 15.58%	0 – 17.33%	1.0
	More than 15.58% - 22.11%	More than 17.33% - 23.55%	1.75
	More than 22.11% - 30.16%	More than 23.55% - 29.09%	2.5
	More than 30.16% - 38.24%	More than 29.09% - 36.11%	3.25
	Above 38.24%	Above 36.11%	4.0
0.10 – 0.20	0 - 15.58%	0 – 17.33%	1.0
	More than 15.58% - 22.11%	More than 17.33% - 23.55%	1.5
	More than 22.11% - 30.16%	More than 23.55% - 29.09%	3.0
	More than 30.16% - 38.24%	More than 29.09% - 36.11%	4.5
	Above 38.24%	Above 36.11%	6.0
Above 0.20	0 - 15.58%	0 – 17.33%	1.0
	More than 15.58% - 22.11%	More than 17.33% - 23.55%	2.0
	More than 22.11% - 30.16%	More than 23.55% - 29.09%	4.0
	More than 30.16% - 38.24%	More than 29.09% - 36.11%	6.0
	Above 38.24%	Above 36.11%	8.0

**Source:** Table prepared by CRS, June 5, 2015, based on CRS analysis of current law and unpublished data provided by the U.S. Department of Education (ED), Budget Service.

- a. The proposed changes have no effect on the state equity factor or the state equity factor ranges used to determine weighted formula child counts. Each state’s equity factor is determined based on variations in average per pupil expenditures among the LEAs in the state.

## Results

**Table 5** details estimated state grants based on the proposed changes to the Title I-A formulas. Overall 15 states would lose funds, ranging from about \$165,000 in Maine to nearly \$306.1 million in New York. As a percentage of funds, no state would lose more than 27.7% of its Title I-A funding. The remaining states and the District of Columbia would receive larger Title I-A grants, ranging from \$471,000 in Rhode Island to \$187.9 million in Texas. As a percentage of funds, states would have their grants increase by up to 21.1%. These percentage gains and losses could be tempered, if desired, by restricting the percentage gains or losses that could be experienced by a state in a given year.

Puerto Rico sees no change in its grant amount under the proposed changes. As previously discussed, this is because Puerto Rico's grant is capped at the percentage amount that Puerto Rico is estimated to receive, relative to other states, in FY2015 under current law and the amount available to states does not change under this analysis.

While there is not always a direct relationship between a state gaining or losing funds and across-the-board changes in LEA grant amounts, some states would experience losses of funding large enough that all LEAs in the state would receive their hold harmless amounts. For example, Connecticut would lose an estimated \$18.1 million under the proposed scenario, and all LEAs in the state would receive lower grants than they would under current law.<sup>8</sup> In other states, despite losses at the state level, estimated LEA grants would increase for some LEAs. For example, Wisconsin would lose an estimated \$7.3 million under the proposed scenario; however, some LEAs would gain funding under the proposal (e.g., Milwaukee School District). Similarly, some LEAs in states that gain funding under the current scenario would lose funding. For example, North Carolina would gain an estimated \$73.5 million under the current proposal, but several LEAs in the state would lose funding under the proposal (e.g., Dare County Schools), while others would gain funding (e.g., Charlotte-Mecklenburg Schools).

**Table 5. Estimated FY2015 State Grants Under Title I-A Assuming All Funds Are Distributed Under the Education Finance Incentive Grant (EFIG) Formula Only, Updated Quintiles Are Used for Weighted Child Counts, the National Average Per Pupil Expenditure Factor is Used for All States, the Effort Factor Is Removed, a Cap is Placed on Puerto Rico's Grant Amount, and a 20% Formula Child Rate Threshold for the Upper Quintiles on the Number-Based Formula Child Weighting Scale Is Applied**

Dollars in thousands

A	B	C	D	E
State	Estimated FY2015 grant calculated by ED	Estimated FY2015 grant based on proposed changes to the Title I-A formulas	Difference in grant amount (Col. C – Col. B)	Percentage change
Alabama	\$221,750	\$258,642	\$36,892	16.6%
Alaska	\$37,289	\$41,100	\$3,811	10.2%
Arizona	\$326,568	\$372,278	\$45,710	14.0%

<sup>8</sup> More specifically, all LEAs in Connecticut would have their hold harmless amounts ratably reduced as the state grant amount for Connecticut under this scenario would not be sufficient to provide all the LEAs in Connecticut with their actual hold harmless amounts.



A	B	C	D	E
State	Estimated FY2015 grant calculated by ED	Estimated FY2015 grant based on proposed changes to the Title I-A formulas	Difference in grant amount (Col. C – Col. B)	Percentage change
Arkansas	\$154,391	\$166,271	\$11,879	7.7%
California	\$1,685,515	\$1,815,696	\$130,181	7.7%
Colorado	\$149,566	\$176,275	\$26,709	17.9%
Connecticut	\$115,900	\$97,807	-\$18,093	-15.6%
Delaware	\$44,406	\$48,473	\$4,066	9.2%
District of Columbia	\$42,907	\$46,212	\$3,305	7.7%
Florida	\$774,922	\$887,336	\$112,413	14.5%
Georgia	\$498,403	\$560,140	\$61,737	12.4%
Hawaii	\$47,013	\$49,916	\$2,903	6.2%
Idaho	\$57,250	\$63,807	\$6,557	11.5%
Illinois	\$664,790	\$483,066	-\$181,724	-27.3%
Indiana	\$256,754	\$282,859	\$26,105	10.2%
Iowa	\$91,505	\$102,650	\$11,145	12.2%
Kansas	\$103,406	\$111,680	\$8,274	8.0%
Kentucky	\$211,850	\$216,718	\$4,868	2.3%
Louisiana	\$285,118	\$259,305	-\$25,813	-9.1%
Maine	\$50,082	\$49,916	-\$165	-0.3%
Maryland	\$196,172	\$156,835	-\$39,337	-20.1%
Massachusetts	\$231,361	\$185,165	-\$46,196	-20.0%
Michigan	\$498,521	\$434,263	-\$64,258	-12.9%
Minnesota	\$149,297	\$152,346	\$3,048	2.0%
Mississippi	\$189,441	\$208,917	\$19,476	10.3%
Missouri	\$240,311	\$247,725	\$7,415	3.1%
Montana	\$45,481	\$49,916	\$4,435	9.8%
Nebraska	\$69,435	\$64,041	-\$5,394	-7.8%
Nevada	\$116,668	\$124,678	\$8,010	6.9%
New Hampshire	\$39,756	\$43,661	\$3,905	9.8%
New Jersey	\$331,058	\$269,970	-\$61,088	-18.5%
New Mexico	\$116,040	\$131,906	\$15,866	13.7%
New York	\$1,106,587	\$800,519	-\$306,068	-27.7%
North Carolina	\$416,675	\$490,167	\$73,492	17.6%
North Dakota	\$33,489	\$37,370	\$3,882	11.6%
Ohio	\$557,262	\$483,757	-\$73,505	-13.2%

A	B	C	D	E
State	Estimated FY2015 grant calculated by ED	Estimated FY2015 grant based on proposed changes to the Title I-A formulas	Difference in grant amount (Col. C – Col. B)	Percentage change
Oklahoma	\$155,989	\$186,634	\$30,644	19.6%
Oregon	\$140,798	\$147,884	\$7,086	5.0%
Pennsylvania	\$541,670	\$414,999	-\$126,671	-23.4%
Puerto Rico	\$418,561	\$418,561	\$0	0.0%
Rhode Island	\$49,445	\$49,916	\$471	1.0%
South Carolina	\$225,748	\$237,444	\$11,696	5.2%
South Dakota	\$43,467	\$48,976	\$5,509	12.7%
Tennessee	\$284,009	\$332,672	\$48,662	17.1%
Texas	\$1,320,268	\$1,508,187	\$187,918	14.2%
Utah	\$87,263	\$105,675	\$18,412	21.1%
Vermont	\$33,149	\$36,692	\$3,543	10.7%
Virginia	\$243,984	\$223,982	-\$20,002	-8.2%
Washington	\$230,008	\$256,061	\$26,053	11.3%
West Virginia	\$88,922	\$84,797	-\$4,125	-4.6%
Wisconsin	\$208,513	\$201,184	-\$7,328	-3.5%
Wyoming	\$33,029	\$36,716	\$3,687	11.2%

**Source:** Table prepared by CRS, June 5, 2015, based on unpublished data provided by the U.S. Department of Education (ED), Budget Service. Estimated FY2015 grants based on current law were calculated by ED. Estimated FY2015 grants based on the proposed changes to the Title I-A formulas were calculated by CRS.

**Notes:** Details may not add to totals due to rounding. Percentages were calculated based on unrounded numbers.

**Notice:** These are estimated grants only. These estimates are provided solely to assist in comparisons of the relative impact of alternative formulas and funding levels in the legislative process. They are not intended to predict specific amounts states will receive. In addition to other limitations, data needed to calculate final grants may not yet be available.

**Tables 6 and 7** provide data on the 25 LEAs estimated to gain or lose the most funding under this proposal. With respect to the 25 LEAs gaining the most funding, the dollar gains range from about \$7.8 million for Duval County School District (FL) to \$153.7 million for Los Angeles Unified School District (CA). Overall, losses among the 25 LEAs losing the most funding range from almost \$3.3 million for Pittsburgh School District (PA) to \$68.5 million in Chicago Public School District 229 (IL). It should be noted that all of the LEAs with the greatest estimated losses in funding are in states that would experience large decreases in overall funding.

The percentage losses in Tables 4 and 5 are calculated relative to the LEA's grant amount as calculated by ED. It should be noted that an LEA may lose more than 15% of its funding relative to its prior year grant amount if the LEA is in a state that would receive a grant amount that is too low to provide the LEAs in the state with their hold harmless amounts.

**Table 6. Estimated FY2015 Grants to Local Educational Agencies (LEAs) Under Title I-A Assuming All Funds Are Distributed Under the Education Finance Incentive Grant (EFIG) Formula Only, Updated Quintiles Are Used for Weighted Child Counts, the National Average Per Pupil Expenditure Factor is Used for All States, the Effort Factor Is Removed, a Cap is Placed on Puerto Rico's Grant Amount, and a 20% Formula Child Rate Threshold for the Upper Quintiles on the Number-Based Formula Child Weighting Scale Is Applied: 25 LEAs with Largest Estimated Gains**

Dollars in thousands

A	B	C	D	E	F
State	LEA	Estimated FY2015 grant calculated by ED	Estimated FY2015 grant based on proposed changes to the Title I-A formulas	Difference in grant amount (Col. D – Col. C)	Percentage change
CA	Los Angeles Unified School District	\$343,621	\$497,367	\$153,746	44.7%
TX	Houston Independent School District	\$105,485	\$165,012	\$59,527	56.4%
TX	Dallas Independent School District	\$92,471	\$143,793	\$51,321	55.5%
FL	Dade County School District	\$126,336	\$164,098	\$37,763	29.9%
TN	Shelby County School District	\$69,531	\$100,991	\$31,459	45.2%
GA	DeKalb County School District	\$38,216	\$57,634	\$19,418	50.8%
CO	Denver County School District I	\$32,863	\$50,420	\$17,557	53.4%
CA	Fresno Unified School District	\$50,574	\$66,671	\$16,097	31.8%
FL	Orange County School District	\$58,861	\$74,620	\$15,759	26.8%
FL	Hillsborough County School District	\$58,532	\$74,184	\$15,652	26.7%
OK	Oklahoma City Public Schools	\$22,570	\$35,735	\$13,165	58.3%
NM	Albuquerque Public Schools	\$35,059	\$47,770	\$12,711	36.3%
FL	Palm Beach County School District	\$49,350	\$62,008	\$12,658	25.6%
IN	Indianapolis Public Schools	\$30,813	\$43,457	\$12,644	41.0%
TX	Fort Worth Independent School District	\$34,486	\$46,687	\$12,201	35.4%
TN	Nashville-Davidson County School District	\$32,177	\$43,183	\$11,005	34.2%
AL	Mobile County School District	\$23,192	\$34,150	\$10,957	47.2%
CA	San Diego City Unified School District	\$39,989	\$50,493	\$10,505	26.3%
NC	Guilford County Schools	\$26,798	\$37,153	\$10,354	38.6%
OK	Tulsa Public Schools	\$17,705	\$27,189	\$9,483	53.6%
NV	Clark County School District	\$93,059	\$102,080	\$9,021	9.7%
WI	Milwaukee School District	\$75,073	\$83,469	\$8,396	11.2%
AZ	Mesa Unified District	\$24,858	\$33,139	\$8,280	33.3%
TX	Aldine Independent School District	\$27,638	\$35,739	\$8,101	29.3%
FL	Duval County School District	\$36,157	\$43,978	\$7,820	21.6%

**Source:** Table prepared by CRS, June 5, 2015, based on unpublished data provided by the U.S. Department of Education (ED), Budget Service. Estimated FY2015 grants based on current law were calculated by ED. Estimated FY2015 grants based on the proposed changes to the Title I-A formulas were calculated by CRS.

**Notes:** Details may not add to totals due to rounding. Percentages were calculated based on unrounded numbers.

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**Table 7. Estimated FY2015 Grants to Local Educational Agencies (LEAs) Under Title I-A Assuming All Funds Are Distributed Under the Education Finance Incentive Grant (EFIG) Formula Only, Updated Quintiles Are Used for Weighted Child Counts, the National Average Per Pupil Expenditure Factor is Used for All States, the Effort Factor Is Removed, a Cap is Placed on Puerto Rico's Grant Amount, and a 20% Formula Child Rate Threshold for the Upper Quintiles on the Number-Based Formula Child Weighting Scale Is Applied: 25 LEAs with Largest Estimated Losses**

Dollars in thousands

A	B	C	D	E	F
State	LEA	Estimated FY2015 grant calculated by ED	Estimated FY2015 grant based on proposed changes to the Title I-A formulas	Difference in grant amount (Col. D – Col. C)	Percentage change
IL	Chicago Public School District 299	\$279,744	\$211,277	-\$68,467	-24.5%
NY	Kings County	\$263,006	\$201,717	-\$61,289	-23.3%
NY	Bronx County	\$207,460	\$164,282	-\$43,178	-20.8%
NY	Queens County	\$133,381	\$99,597	-\$33,785	-25.3%
PA	Philadelphia City School District	\$169,568	\$140,238	-\$29,330	-17.3%
NY	New York County	\$76,734	\$55,060	-\$21,673	-28.2%
MI	Detroit City School District	\$139,667	\$126,986	-\$12,681	-9.1%
NY	Buffalo City School District	\$32,164	\$21,678	-\$10,486	-32.6%
NY	Rochester City School District	\$27,789	\$18,124	-\$9,665	-34.8%
MD	Montgomery County Public Schools	\$25,933	\$16,435	-\$9,498	-36.6%
NY	Richmond County	\$23,343	\$13,845	-\$9,498	-40.7%
MD	Prince George's County Public Schools	\$31,718	\$25,371	-\$6,347	-20.0%
LA	Jefferson Parish School District	\$26,670	\$20,444	-\$6,226	-23.3%
MA	Boston School District	\$39,060	\$33,078	-\$5,981	-15.3%
MD	Baltimore County Public Schools	\$25,959	\$20,642	-\$5,317	-20.5%
PA	Allentown City School District	\$13,319	\$8,314	-\$5,005	-37.6%
MD	Baltimore City Public Schools	\$49,459	\$44,503	-\$4,957	-10.0%
OH	Columbus City School District	\$46,241	\$41,465	-\$4,775	-10.3%
IL	Rockford School District 205	\$15,207	\$10,471	-\$4,736	-31.1%

A	B	C	D	E	F
State	LEA	Estimated FY2015 grant calculated by ED	Estimated FY2015 grant based on proposed changes to the Title I-A formulas	Difference in grant amount (Col. D – Col. C)	Percentage change
NY	Syracuse City School District	\$14,976	\$10,534	-\$4,442	-29.7%
NY	Yonkers City School District	\$10,639	\$6,420	-\$4,219	-39.7%
NY	Kiryas Joel Village Union Free School District	\$9,854	\$5,696	-\$4,158	-42.2%
OH	Cleveland Municipal School District	\$51,960	\$48,224	-\$3,735	-7.2%
NY	East Ramapo Central School District (Spring Valley)	\$16,909	\$13,505	-\$3,404	-20.1%
PA	Pittsburgh School District	\$17,276	\$14,026	-\$3,250	-18.8%

**Source:** Table prepared by CRS, June 5, 2015, based on unpublished data provided by the U.S. Department of Education (ED), Budget Service. Estimated FY2015 grants based on current law were calculated by ED. Estimated FY2015 grants based on the proposed changes to the Title I-A formulas were calculated by CRS.

**Notes:** Details may not add to totals due to rounding. Percentages were calculated based on unrounded numbers.

**Notice:** These are estimated grants only. These estimates are provided solely to assist in comparisons of the relative impact of alternative formulas and funding levels in the legislative process. They are not intended to predict specific amounts LEAs will receive. In addition to other limitations, data needed to calculate final grants may not yet be available.

Finally, **Table 8** shows the estimated LEA grant amounts for LEAs in North Carolina under this scenario. Guilford County Schools would gain the largest amount of funding (\$10.4 million), while Dare County Schools would experience the greatest loss of funding (\$105,000). All LEAs in North Carolina that previously received a grant would continue to receive Title I-A funding under this scenario. As in Table 5, the percentage losses in Table 6 are calculated relative to the LEA's grant amount as calculated by ED. These estimated grant amounts, however, still meet the hold harmless requirements relative to each LEA's FY2014 grant amount.

**Table 8. Estimated FY2015 Grants to Local Educational Agencies (LEAs) Under Title I-A Assuming All Funds Are Distributed Under the Education Finance Incentive Grant (EFIG) Formula Only, Updated Quintiles Are Used for Weighted Child Counts, the National Average Per Pupil Expenditure Factor is Used for All States, the Effort Factor Is Removed, a Cap is Placed on Puerto Rico's Grant Amount, and a 20% Formula Child Rate Threshold for the Upper Quintiles on the Number-Based Formula Child Weighting Scale Is Applied: LEAs in North Carolina**

Dollars in thousands

A	B	C	D	E
LEA	Estimated FY2015 grant calculated by ED	Estimated FY2015 grant based on proposed changes to the Title I-A formulas	Difference in grant amount (Col. C – Col. B)	Percentage change
Alamance-Burlington Schools	\$6,759	\$8,083	\$1,325	19.6%
Alexander County Schools	\$1,126	\$1,079	-\$47	-4.2%
Alleghany County Schools	\$458	\$458	\$0	0.0%
Anson County Schools	\$1,473	\$1,763	\$290	19.7%
Ashe County Schools	\$1,037	\$1,092	\$55	5.3%
Asheboro City Schools	\$1,747	\$2,039	\$291	16.7%
Asheville City Schools	\$1,636	\$1,636	\$0	0.0%
Avery County Schools	\$669	\$754	\$85	12.7%
Beaufort County Schools	\$2,274	\$2,543	\$269	11.8%
Bertie County Schools	\$1,028	\$1,186	\$158	15.4%
Bladen County Schools	\$2,114	\$2,542	\$429	20.3%
Brunswick County Schools	\$3,729	\$4,131	\$402	10.8%
Buncombe County Schools	\$6,632	\$7,718	\$1,086	16.4%
Burke County Schools	\$3,644	\$4,020	\$376	10.3%
Cabarrus County Schools	\$4,326	\$4,944	\$618	14.3%
Caldwell County Schools	\$3,116	\$3,116	\$0	0.0%
Camden County Schools	\$167	\$164	-\$2	-1.5%
Camp Lejeune Schools	\$573	\$573	\$0	0.0%
Carteret County Schools	\$2,000	\$2,024	\$24	1.2%
Caswell County Schools	\$981	\$1,074	\$93	9.5%
Catawba County Schools	\$4,039	\$4,387	\$349	8.6%
Chapel Hill-Carrboro Schools	\$1,032	\$1,110	\$78	7.6%
Charlotte-Mecklenburg Schools	\$40,680	\$47,835	\$7,155	17.6%
Chatham County Schools	\$1,945	\$1,963	\$18	0.9%
Cherokee County Schools	\$1,256	\$1,405	\$149	11.9%
Clay County Schools	\$406	\$430	\$24	5.9%
Cleveland County Schools	\$5,019	\$5,214	\$195	3.9%

A	B	C	D	E
LEA	Estimated FY2015 grant calculated by ED	Estimated FY2015 grant based on proposed changes to the Title I-A formulas	Difference in grant amount (Col. C – Col. B)	Percentage change
Clinton City Schools	\$898	\$957	\$59	6.5%
Columbus County Schools	\$2,636	\$2,889	\$253	9.6%
Craven County Schools	\$4,104	\$4,620	\$516	12.6%
Cumberland County Schools	\$15,848	\$21,190	\$5,342	33.7%
Currituck County Schools	\$612	\$553	-\$59	-9.7%
Dare County Schools	\$829	\$725	-\$105	-12.6%
Davidson County Schools	\$4,810	\$5,541	\$731	15.2%
Davie County Schools	\$1,065	\$986	-\$79	-7.4%
Duplin County Schools	\$3,591	\$4,157	\$566	15.8%
Durham Public Schools	\$10,568	\$13,055	\$2,486	23.5%
Eastern Cherokee Reservation	\$604	\$716	\$112	18.5%
Edenton-Chowan Schools	\$735	\$835	\$100	13.6%
Edgecombe County Schools	\$2,867	\$3,502	\$635	22.1%
Elkin City Schools	\$243	\$247	\$4	1.5%
Forsyth County Schools	\$19,010	\$25,128	\$6,118	32.2%
Fort Bragg Schools	\$1,172	\$1,172	\$0	0.0%
Franklin County Schools	\$2,415	\$2,440	\$25	1.1%
Gaston County Schools	\$10,333	\$13,150	\$2,817	27.3%
Gates County Schools	\$416	\$390	-\$26	-6.3%
Graham County Schools	\$482	\$569	\$87	18.0%
Granville County Schools	\$1,754	\$1,754	\$0	0.0%
Greene County Schools	\$1,140	\$1,296	\$156	13.7%
Guilford County Schools	\$26,798	\$37,153	\$10,354	38.6%
Halifax County Schools	\$2,567	\$3,024	\$458	17.8%
Harnett County Schools	\$5,472	\$6,404	\$932	17.0%
Haywood County Schools	\$2,095	\$2,126	\$31	1.5%
Henderson County Schools	\$3,645	\$4,022	\$376	10.3%
Hertford County Schools	\$1,326	\$1,609	\$283	21.4%
Hickory City Schools	\$1,341	\$1,354	\$13	1.0%
Hoke County Schools	\$2,957	\$3,259	\$302	10.2%
Hyde County Schools	\$223	\$238	\$15	6.6%
Iredell-Statesville Schools	\$4,021	\$4,443	\$422	10.5%
Jackson County Schools	\$1,369	\$1,557	\$187	13.7%

A	B	C	D	E
LEA	Estimated FY2015 grant calculated by ED	Estimated FY2015 grant based on proposed changes to the Title I-A formulas	Difference in grant amount (Col. C – Col. B)	Percentage change
Johnston County Schools	\$7,560	\$8,565	\$1,006	13.3%
Jones County Schools	\$478	\$544	\$67	14.0%
Kannapolis City Schools	\$1,597	\$1,604	\$8	0.5%
Lee County Schools	\$2,658	\$2,733	\$76	2.8%
Lenoir County Schools	\$3,233	\$3,614	\$381	11.8%
Lexington City Schools	\$1,826	\$2,571	\$745	40.8%
Lincoln County Schools	\$2,332	\$2,359	\$27	1.2%
Macon County Schools	\$1,339	\$1,339	\$0	0.0%
Madison County Schools	\$800	\$827	\$27	3.4%
Martin County Schools	\$1,455	\$1,485	\$31	2.1%
McDowell County Schools	\$1,906	\$1,992	\$86	4.5%
Mitchell County Schools	\$579	\$608	\$30	5.1%
Montgomery County Schools	\$1,438	\$1,438	\$0	0.0%
Moore County Schools	\$3,066	\$3,112	\$46	1.5%
Mooresville City Schools	\$663	\$642	-\$22	-3.3%
Mount Airy City Schools	\$569	\$672	\$104	18.2%
Nash-Rocky Mount Schools	\$4,941	\$5,647	\$706	14.3%
New Hanover County Schools	\$7,386	\$8,901	\$1,515	20.5%
Newton-Conover City Schools	\$1,012	\$1,177	\$165	16.3%
Northampton County Schools	\$1,536	\$1,599	\$63	4.1%
Onslow County Schools	\$6,498	\$7,743	\$1,245	19.2%
Orange County Schools	\$1,276	\$1,221	-\$55	-4.3%
PART D SUBPART 2	\$815	\$815	\$0	0.0%
Pamlico County Schools	\$509	\$572	\$63	12.4%
Pasquotank County Schools	\$1,823	\$2,003	\$180	9.9%
Pender County Schools	\$2,063	\$2,095	\$31	1.5%
Perquimans County Schools	\$738	\$876	\$138	18.7%
Person County Schools	\$1,399	\$1,347	-\$51	-3.7%
Pitt County Schools	\$8,473	\$10,438	\$1,965	23.2%
Polk County Schools	\$615	\$596	-\$19	-3.1%
Randolph County Schools	\$4,973	\$5,754	\$781	15.7%
Richmond County Schools	\$3,061	\$3,717	\$656	21.4%
Roanoke Rapids City Schools	\$1,095	\$1,362	\$268	24.5%



A	B	C	D	E
LEA	Estimated FY2015 grant calculated by ED	Estimated FY2015 grant based on proposed changes to the Title I-A formulas	Difference in grant amount (Col. C – Col. B)	Percentage change
Robeson County Schools	\$12,419	\$15,217	\$2,798	22.5%
Rockingham County Schools	\$3,690	\$4,080	\$390	10.6%
Rowan-Salisbury Schools	\$6,002	\$7,096	\$1,094	18.2%
Rutherford County Schools	\$3,523	\$4,061	\$538	15.3%
Sampson County Schools	\$2,512	\$2,659	\$147	5.9%
Scotland County Schools	\$2,818	\$3,662	\$845	30.0%
Stanly County Schools	\$2,145	\$2,176	\$31	1.5%
Stokes County Schools	\$1,296	\$1,296	\$0	0.0%
Surry County Schools	\$2,550	\$2,639	\$88	3.5%
Swain County Schools	\$363	\$377	\$14	3.8%
Thomasville City Schools	\$1,677	\$2,445	\$768	45.8%
Transylvania County Schools	\$1,198	\$1,198	\$0	0.0%
Tyrrell County Schools	\$230	\$287	\$57	24.7%
Undistributed	\$0	\$0	\$0	0.0%
Union County Public Schools	\$5,878	\$7,848	\$1,970	33.5%
Vance County Schools	\$3,547	\$3,547	\$0	0.0%
Wake County Schools	\$28,075	\$33,136	\$5,060	18.0%
Warren County Schools	\$1,183	\$1,482	\$299	25.2%
Washington County Schools	\$860	\$1,043	\$183	21.3%
Watauga County Schools	\$870	\$821	-\$49	-5.7%
Wayne County Public Schools	\$6,864	\$8,221	\$1,357	19.8%
Weldon City Schools	\$658	\$920	\$263	40.0%
Whiteville City Schools	\$1,016	\$1,312	\$297	29.2%
Wilkes County Schools	\$2,936	\$3,096	\$160	5.5%

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I hope this information is useful. Please contact Becky Skinner at 7-6600 or [rskinner@crs.loc.gov](mailto:rskinner@crs.loc.gov) if you have any questions or need additional assistance.