



UNITED STATES DEPARTMENT OF EDUCATION

WASHINGTON, DC 20202

August 11, 2017

Mr. Tom Torlakson
California Superintendent of Public Instruction
California Department of Education
1430 N Street
Sacramento, California 95814-5901

State Superintendent
of Public Instruction

AUG 14 2017

Dear Mr. Tom Torlakson:

I am writing to inform you about the U.S. Department of Education's upcoming Study of Weighted Student Funding (WSF) and School-Based Budgeting Systems (SBB), an important new study examining how school districts allocate funds and resources to their schools. I would like to take this opportunity to explain the purpose of the study and to ask for your support in encouraging school districts to participate.

The purpose of this study is to understand different systems for allocating resources to schools including school-based budgeting practices and weighted student formulas. We are interested in the variation in implementation of such systems; the outcomes in terms of levels of principal autonomy, transparency of resource allocation, and equity of resource distribution; the interactions of WSF and SBB systems with school choice policies; and the challenges each district may have faced in undertaking such changes to their budgeting and planning systems. In 2017, the study will include:

- *Surveys* with a national sample of approximately 400 school district administrators and 679 principals including 55 districts and 82 schools in your state. The time required to complete the survey is estimated to be 20 to 30 minutes. All respondents submitting completed surveys will receive a \$25 gift card as a token of our appreciation.
- *Case studies* with a sample of nine case study districts (including 1 district in your state) that will involve up to seven in-person interviews with district officials and school staff involved in WSF system administration and a review of relevant documents and analysis of budget and fiscal data. The time required for each case study interview is estimated to average 60 minutes.

This is the first national, comprehensive study of SBB and WSF systems, and will enable states and school districts interested in adopting such practices to learn from the experiences of other districts. While participation in this study is not required, we would be appreciative if you could encourage the selected districts within your state to participate so that the study can represent the experiences of all types of districts. A list of sampled districts in your state is provided on the reverse side of this letter.

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The U.S. Department of Education has contracted with American Institutes for Research (AIR) to undertake this study. The study team will begin contacting districts and schools in the next several weeks to secure their cooperation.

Should you have any questions, or if you would like to discuss this study further, please feel free to contact the project officer, Oliver Schak of the U.S. Department of Education, at 202-453-5643 or Oliver.Schak@ed.gov. You also may contact the project director, Jesse Levin of AIR, at 650-376-6270 or fundingstudy@air.org.

We thank you in advance for your cooperation and support.

Sincerely,

A handwritten signature in black ink, appearing to read 'JBE', with a long horizontal line extending to the right.

Jennifer Bell-Ellwanger
Director, Policy and Program Studies Service
U.S. Department of Education



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California school districts selected to be included in the Study of Weighted Student Funding (WSF) and School-Based Budgeting Systems (SBB)

ABC Unified School District	Merced Union High School District
Anaheim Union High School District	Natomas Unified School District
Bakersfield City School District	Newport-Mesa Unified School District
Barstow Unified School District	North Monterey County Unified
Bonita Unified School District	Norwalk-La Mirada Unified School District
Cajon Valley Union School District	Oak Grove School District
Chaffey Joint Union High School District	Oakland Unified School District
Chico Unified School District	Pajaro Valley Unified
Covina-Valley Unified School District	Palmdale School District
Cupertino Union School District	Rocklin Unified School District
Del Mar Union Elementary	Sacramento City Unified School District
Elk Grove Unified School District	Saddleback Valley Unified
Encinitas Union Elementary School District	Salinas Union High School District
Fontana Unified School District	San Francisco Unified School District
Franklin-McKinley School District	San Jacinto Unified School District
Fremont Unified School District	San Marcos Unified School District
Fresno Unified School District	San Rafael City Elementary School District
Garden Grove Unified School District	San Ramon Valley Unified
Garvey School District	Saugus Union School District
Helendale School District	Selma Unified School District
Hesperia Unified School District	Sonoma Valley Unified School District
Huntington Beach Union High School District	Tustin Unified School District
Lake Elsinore Unified	Twin Rivers Unified School District
Lodi Unified School District	Victor Elementary School District
Loomis Union Elementary	Victor Valley Union High School District
Lynwood Unified School District	Walnut Valley Unified School District
Menifee Union School District	West Contra Costa Unified School District
Merced City Elementary School District	

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