

**Appendix G:**  
**District Administrator Survey**  
**for the Study of**  
**Weighted Student Funding (WSF) and**  
**School-Based Budgeting (SBB) Systems**

**STUDY OF  
WEIGHTED STUDENT FUNDING  
AND  
SCHOOL-BASED BUDGETING (SBB) SYSTEMS**

**DISTRICT ADMINISTRATOR SURVEY  
2017-18 SCHOOL YEAR**

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB number. The valid OMB control number of this information collection is ###-####. The time required to complete this information collection is estimated to average 30 minutes per survey, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimates(s) or suggestion for improving this form, please write to: U.S. Department of Education, Washington, 20202-4651. If you have comments or concerns regarding the status of your individual submission of this form, write directly to:

Policy and Program Studies Service, Office of the Deputy Secretary,  
U.S. Department of Education, 400 Maryland Avenue, SW, Washington, DC 20202.

Thank you for agreeing to participate in the Study of Weighted Student Funding and School-Based Budgeting Systems District Administrator Survey.

- **Purpose of Study:** To better understand different systems for allocating resources to schools including school-based budgeting practices and weighted student formulas.
- **Sponsor:** The study is sponsored by the U.S. Department of Education and is being conducted under contract by the American Institutes for Research (AIR).
- **Participation Requirement:** Participation is voluntary. You may choose not to respond to certain questions or discontinue the survey at any time.
- **Reporting and Confidentiality:** Responses to this survey will be used to summarize findings in an aggregate manner (across groups or sites) or will be used to provide examples of program implementation in a manner that does not associate responses with a specific site or individual. The study team will use only the survey responses you provide in its analysis and neither the name of any district nor your name will be used in any reporting. The study team will make sure that access to all data with identifiable information is limited to members of the study team. Except for that which is already public, every effort will be made to maintain the confidentiality for all information collected and **we will not provide information that identifies you or your district to anyone outside the study team**, except as required by law.
- **Response Burden:** This survey should require approximately 20-30 minutes of your time.
- **Benefits:** Your participation will help inform policymakers, educators and researchers at the local, state, and national level about how weighted student funding and school-based budgeting systems are implemented.
- **More Information:** For questions or more information about this study, you may contact the AIR study team at [FundingStudy@air.org](mailto:FundingStudy@air.org) or call the study toll-free-number at, 1-8xx-xxx-xxxx and select option X.

Thank you for your cooperation in this very important effort!

#### **PAPER VERSION ONLY**

Please write your answers directly on the questionnaire by checking the appropriate box or writing your answer in the space provided.

#### **WEB VERSION ONLY**

##### **[IF A DISTRICT REQUIRES YES/NO RESPONSE IN THE SURVEY THEN DISPLAY]**

**Do you agree to participate in this survey?**

*Please select only one answer and click the "Next" button.*

- ☐ Yes, I agree to participate in this survey.
- ☐ No, I do not wish to participate in this survey.

##### **[WEB VERSION ONLY, IF NO. THEN DISPLAY]**

Thank you for your time. If you do not wish to participate, click the "Next" button to end your survey. If you wish to participate, please click the "Previous" button to change your response. Thank you.

**[IF THE "NEXT" BUTTON SELECTED, THEN DISPLAY]** This concludes the survey; please click the "Submit" button to finalize your responses.

##### **[IF A DISTRICT DOES NOT REQUIRE YES/NO RESPONSE IN THE SURVEY THEN DISPLAY]**

Please click the "Next" button to continue.



**1. What is the total number of schools in your district?**

*Please provide a number in the box below.*

*Number of schools in your district*

**2. Are there policies in place that enable students and their families to apply for enrollment in schools of their choice that are within the district but outside of their neighborhood?**

*Please select all that apply.*

- ☐ No, there is no school choice mechanism in this district.
- ☐ No, but parents may apply for their child to transfer to another school in the district under certain circumstances.
- ☐ Yes, parents can choose from schools throughout the district (open enrollment), and students are assigned based on parent choices and other factors such as availability of seats.
- ☐ Yes, they can apply to magnet schools based on the student's interests and/or qualifications.
- ☐ Yes, they can apply to charter schools that the district operates.
- ☐ Yes, they can apply to charter schools in the area that are not run by our district.
- ☐ Yes, there is a local or state voucher program to support students' attendance at private schools.
- ☐ Yes, we have another type of public school choice program. Please specify:

**3. Does your district allocate any funding to schools on a per-pupil basis?**

- ☐ Yes, **GO TO QUESTION 4**
- ☐ No, **GO TO QUESTION 12**

**4. For the current school year (2017-18), what percentage of your total district operational budget is distributed to schools on a per-pupil basis?**

*Please enter a percentage in the box below. Your best estimate is fine.*

*% Percentage of total district budget distributed on a per-pupil basis*

**5. Which of the following best describes the discretionary per-pupil funding schools receive?**

*Discretionary funds are those over which school leaders have authority to make spending decisions.*

- ☐ Discretionary per-pupil funding covers the majority of the school-level operational budget, including core staff. **[SBB District] GO TO QUESTION 6**
- ☐ Discretionary dollars are largely for purchasing supplies and materials or supplemental staffing positions. Core staff positions are determined by staffing formulas maintained by the district. **GO TO QUESTION 12**

**6. What is the base per-pupil allocation amount for schools in your district?**

*Please enter a dollar amount in the box below.*

\$

Base per-pupil allocation amount

# 7. How are per-pupil funds adjusted to account for student needs or demographics?

Please select only one answer.

- ☐ A base per-pupil amount is weighted according to student needs. For example, economically disadvantaged students count as an additional 0.5 students for funding allocations. [WSF District] **GO TO QUESTION 8**
- ☐ An additional flat per-pupil allocation is provided for certain types of students (for example, \$1,000 of additional funding is provided for each economically disadvantaged student.) [WSF District] **GO TO QUESTION 8**
- ☐ They are not adjusted. The per-pupil allocation is the same regardless of student needs. [SBB District] **GO TO QUESTION 9**

# 8. Please indicate the student needs categories that receive additional resources in the school funding allocation formula by entering the weights used OR additional dollar amounts prescribed by the formula. [WSF District Only]

Alternatively, if your formula for funding schools is well documented you can provide this documentation [FOR WEB SURVEY: by uploading it here.] FOR PAPER SURVEY: by attaching a copy of this documentation with your completed survey.]

Please enter a value in **either** column A, column B or select "Not applicable" in column C for each row.

	COLUMN A	COLUMN B	COLUMN C
	Weight Used (for example, 1.5 means students in this group generate 50% more funding than the base student amount)	Additional Dollar Amount (for example \$100 means that students in this group generate an additional \$100 dollars of funding on top of the base student amount)	Not Applicable
a. Economically disadvantaged students	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Not applicable
b. English learners	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Not applicable
c. Students with disabilities	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Not applicable
d. Students in foster care	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Not applicable
e. Homeless students	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Not applicable
f. Students with low academic performance	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Not applicable
g. Gifted and talented students	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Not applicable
h. Elementary school students	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Not applicable
i. Middle school students	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Not applicable
j. High school students	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Not applicable
k. Other; please specify below. <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	
l. Other; please specify below. <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	

m. Other; please specify below. <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	
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9. Does your system of school-level per-pupil funding provide additional dollars to small schools? [WSF and SBB]

☐ Yes

☐ No

10. In your district, are school funding levels adjusted mid-year to account for increases or decreases in school enrollment? [WSF and SBB]

☐ Yes

☐ No

11. In which school year did your district begin distributing funds to schools based on student needs? [WSF District]

School year district began distributing funds based on student needs

12. Please indicate your district's total general/unrestricted and categorical/restricted operational spending in the previous school year (2016-17), and the amount in each category that was provided to schools for their discretionary use.

**General / Unrestricted** refers to state and local funding that is not intended for a specific program or student group.

**Categorical / Restricted** refers to state and federal funding that is intended to be used on a specific program or set of students.

Please enter your best estimate in each box below. Enter \$0 if applicable.

	Revenue Category		Total
	General / Unrestricted	Categorical / Restricted	
a. Total operational spending	\$	\$	(Web auto total)
b. Amount for discretionary use by schools	\$	\$	(Web auto total)



13. In the current school year (2017-18), how much influence does the district have with respect to hiring the following staff compared to schools (including principals, teachers, other school staff, and committees including parents and/or community members)?

Please select one answer in each row. If decisions are made at a level above the district (e.g., by the state), please select "Decision mostly made by district-level staff."

	Decision mostly made by district-level staff	Decision evenly shared between district and school-level staff or stakeholders	Decision mostly made by school-level staff and stakeholders	Unsure
a. Regular classroom teachers (core grades/subjects)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
b. Special area or resource teachers (e.g., music, art, technology, English learner resource teacher)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
c. Special education teachers	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
d. Instructional aides	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
e. Instructional coaches	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
f. Pupil support staff (e.g., counselors)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
g. Principals	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
h. Teachers or instructional aides paid through restricted federal funds (e.g., Title I or Title III)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
i. Assistant principals	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

14. In the current school year (2017-18), how much influence does the district have with respect to selecting materials or services compared to schools (principals, teachers, other school staff, and committees including parents and/or community members)?

Please select one answer in each row. If decisions are made at a level above the district (e.g., by the state), please select "Decision mostly made by district-level staff."

	Decision mostly made by district-level staff	Decision evenly shared between district and school-level staff or stakeholders	Decision mostly made by school-level staff and stakeholders	Unsure
a. Textbooks	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
b. Curricular materials	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
c. Instructional software	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
d. Office supplies	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
e. External non-district service providers (contracted services)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
f. Food services	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

**15. Thinking about the schools in your district that serve the highest proportion of economically disadvantaged students, please indicate whether those schools receive less or more resources than other schools in the following areas?**

*Please select one answer in each row.*

	Substantially less	Somewhat less	About the same amount	Somewhat more	Substantially more
a. School operational budget per pupil	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
b. Access to high-quality, rigorous courses	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
c. Access to experienced teachers	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
d. Smaller class sizes	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
e. Timely and aligned professional development opportunities for staff	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
f. Up-to-date curricular and instructional materials	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
g. Educational technology	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
h. Safe and adequate facilities	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
i. Access to teachers with advanced degrees	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
j. Access to classes with low student to teacher ratios	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**16. Which of the following types of information do you provide to principals regarding the resources their school will receive?**

*Please select all that apply.*

- ☐ The amount of discretionary funding the school will receive from the general district budget.
- ☐ The amount of discretionary funding the school will receive from restricted funding sources, such as Title I or funding earmarked for special education.
- ☐ The number of staffing positions the school will receive from the general budget.
- ☐ The number of staffing positions the school will receive from restricted funding sources, such as Title I or funding earmarked for special education.
- ☐ The cost of district-provided services received by the school.
- ☐ The total school-level operational budget consisting of all discretionary and non-discretionary resources from all funds.
- ☐ A general description of how funding or staffing levels were determined.
- ☐ The specific calculation of how funding or staffing levels were determined for their school (e.g. a spreadsheet showing how the calculations were made).

**17. In the previous school year (2016-17), how did your district communicate information to schools about the resources they will receive?**

*Please select all that apply.*

- ☐ One-time principal meeting
- ☐ Ongoing principal meetings
- ☐ E-mails or other written notices
- ☐ Training for principals
- ☐ Training for other school staff
- ☐ Posting information on internal district website
- ☐ Posting information publicly on district website
- ☐ Other, please specify below:

**18. On a scale from 1 to 5 where 1 is not at all important and 5 is extremely important, how important was each of the following goals when your district was developing its system of allocating resources to schools?**

*Please select one answer in each row.*

Goal	1 Not at all important	2	3	4	5 Extremely important
a. Increasing transparency in resource allocation decisions	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
b. Giving principals more control over budgeting decisions in their schools	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
c. Increasing principals' accountability for producing student outcomes	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
d. Making resource allocation more equitable between high- and low- need schools	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
e. Empowering a variety of stakeholder groups (e.g., teachers, principals, communities) to contribute to school decision-making	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
f. Other; please specify below: <input type="text"/>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

**19. In the previous school year (2016-17), to what extent were each of the following a districtwide challenge?**

*Please select one answer in each row.*

	Not a challenge	Minor challenge	Moderate challenge	Major challenge
a. Inadequate funding available for the district	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
b. Inequity in resource distribution among schools in the district	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
c. Transparency surrounding the mechanism by which resources were distributed to schools	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
d. Resistance from <u>school-level staff</u> for new initiatives	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
e. Resistance from <u>teacher unions</u> for new initiatives	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
f. Unpredictability of <u>enrollment patterns</u> that affect funding decisions	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
g. Unpredictable <u>student needs</u> that could affect funding allocations	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

**20. How much of a challenge is each of the following with respect to the system of school-level funding in your district?**

*Please select one answer in each row.*

	Not a challenge	Minor challenge	Moderate challenge	Major challenge
a. Principals lack the preparation to make effective decisions regarding their <u>school-level instructional program</u>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
b. Principals lack the preparation to make <u>budgeting and resource allocation decisions</u> for their school	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
c. Principals are unclear as to the <u>flexibility</u> with which they can use <u>funding from categorical programs</u> for particular student populations (e.g., English learners, special education, etc.)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
d. Principals lack the necessary understanding to <u>comply with regulation</u> surrounding the <u>use of categorical funding</u> for particular student populations (e.g., English learners, special education, etc.)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

21. During the previous school year (2016-17, including summer 2017), which of the following best describes the professional development offered to school-level staff involved in planning and budgeting?

*Please select only one answer.*

- ☐ Professional development around planning and budgeting was not offered to any school-level staff involved in these functions.
- ☐ Optional professional development around planning and budgeting was offered to school-level staff.
- ☐ Mandatory professional development around planning and budgeting was provided for school-level staff from some (but not all) schools.
- ☐ Mandatory professional development around planning and budgeting was provided for school-level staff from all schools.

22. Aside from formal professional development, what additional support is available for schools on planning and budgeting?

*Please select all that apply.*

- ☐ There is a district staff person assigned to each school to assist with the school plan and budget.
- ☐ District-level staff are available for in-person technical assistance as needed.
- ☐ District-level staff are available to provide technical assistance by phone as needed.
- ☐ Other, please specify below:

23. How many full-time equivalent staff (FTEs) in your district office support schools in their planning and budgeting work?

Enter number of full-time equivalent staff (FTEs)

24. Which of the following expenditure types, if any, are schools in your district permitted to purchase from external (non-district) vendors?

*Please select all that apply. If none, please select none.*

- ☐ Professional Development Providers
- ☐ Facilities/janitorial services
- ☐ Food services
- ☐ Computer hardware/equipment
- ☐ Instructional materials
- ☐ Other supplies and materials
- ☐ Other, please specify below:

- ☐ None

**[PAPER VERSION ONLY, WEB VERSION WILL AUTOSKIP]**

**24a. Please refer back to Question 3. Did you answer “yes” or “no” to the question “Does your district allocate any amount of funding to schools on a per-pupil basis?”**

- Yes [My district allocates funding to schools on a per-pupil basis.] **GO TO QUESTION 24b**
- No [My district does not allocate funding to schools on a per-pupil basis.] **GO TO QUESTION 24c**

**24b. Please refer back to Questions 5. Which option did you select?**

- Discretionary per-pupil funding covers the majority of the school-level operational budget, including core staff. [SBB District] **GO TO QUESTION 25**
- Discretionary dollars are largely for purchasing supplies and materials or supplemental staffing positions. Core staffing positions are determined separately. **GO TO QUESTION 24c**

**24c. Weighted student funding systems are systems that districts implement to provide resources to schools largely in the form of dollars allocated on a per-pupil basis. Such systems differentially allocate dollars to schools based on student needs by using weights for students falling into various categories. In addition, school principals in consultation with other staff and stakeholders have discretion over how dollars allocated to schools are used, giving schools with more autonomy regarding the instructional programming and services provided to students. As part of the Every Student Succeeds Act (ESSA) the U.S. Department of Education is looking for up to 50 school districts to pilot weighted student funding systems.**

**Is your school district interested in applying to participate in piloting a weighted student funding system?**

- ☐ Yes **GO TO QUESTION 34**  
☐ No **GO TO QUESTION 34**  
☐ Unsure at this time **GO TO QUESTION 34**

**25. For the current school year (2017-18), how much of a challenge are each of the following with respect to the per-pupil funding system in your district?**

*Please select one answer in each row.*

	Not a Challenge	Minor Challenge	Moderate Challenge	Major Challenge
a. Insufficient training for principals (e.g., none available ;poor quality training)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
b. Inadequate data to help inform decisions	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
c. Inadequate communication from the district to principals	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
d. Inadequate principal knowledge/skill to make <u>instructional decisions</u>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
e. Inadequate principal knowledge/skill to make <u>budgeting decisions</u>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
f. Difficulty predicting school resources from year to year	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
g. Difficulty obtaining community buy-in	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
h. Difficulty obtaining buy-in from school-level staff	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

**26. For the current school year (2017-18), what could happen if a school's spending is more than their discretionary per-pupil budget?**

*Please select all that apply.*

- ☐ As a penalty, the amount overspent could be deducted from the budget for next year.
- ☐ The principal could receive additional training on budget development
- ☐ The principal could receive additional training on budget monitoring.
- ☐ The principal could be given discretion over a smaller part of their school's budget.
- ☐ Schools are not able to spend more than their discretionary budget; systems will block overspending.
- ☐ Other, please specify below:

- ☐ None of the above.

**27. For the current school year (2017-18), what could happen if a school's spending is less than their discretionary per-pupil budget?**

*Please select all that apply.*

- ☐ Funds will roll over to the next year.
- ☐ Schools would lose the funds not spent.
- ☐ The principal could receive additional training on budget development
- ☐ The principal could receive additional training on budget monitoring
- ☐ The principal could be given discretion over a smaller part of their school's budget.
- ☐ Other, please specify below:

- ☐ None of the above.

**28. Please indicate what could happen if schools in your district do not meet performance targets in the current (2017-18) school year.**

*Please select yes or no for each item.*

	Yes	No
a. They will have less autonomy over hiring and personnel decisions.	<input type="checkbox"/> 1	<input type="checkbox"/> 2
b. They will have control over a smaller portion of their school's total budget.	<input type="checkbox"/> 1	<input type="checkbox"/> 2
c. The district will more closely evaluate next year's budget and site plans.	<input type="checkbox"/> 1	<input type="checkbox"/> 2
d. The district will more closely monitor the implementation of next year's budget and site plans.	<input type="checkbox"/> 1	<input type="checkbox"/> 2

**29. Comparing the current school year (2017-18) to the school year before your per-pupil funding system was implemented, to what extent...**

*Please select one answer in each row.*

	Decreased Substantially	Decreased Slightly	Stayed About the Same	Increased Slightly	Increased Substantially	Unsure
a. Has funding changed in schools with a greater proportion of high needs students relative to schools with fewer high needs students?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
b. Has funding changed for small schools relative to larger schools?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
c. Has funding changed for charter schools relative to traditional schools?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
d. Has the quality of the instructional program changed in schools with higher needs students relative to schools with lower needs students?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
e. Has the share of the principals' control over the budget changed?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
f. Has the ability of principals to use their schools' discretionary resources to address the needs of their students changed?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
g. Has the ability of principals to implement new and/or innovative approaches to educating their students changed?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
h. Has teacher involvement in decisions about how to use staff and funding at their schools changed?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6
i. Has parent involvement in decisions about how to use staff and funding at their schools changed?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6



**30. Please indicate whether your district's school-level per-pupil funding formula has a hold harmless provision to protect schools?**

*A hold harmless provision is defined as a policy to ensure that no school is funded at a lower level than the prior year.  
Please select only one answer.*

☐ Yes **GO TO QUESTION 31**

☐ No **GO TO QUESTION 32**

**31. For how many years are schools in your district held harmless, or phased out of being held harmless, under this provision?**

*Please enter a number in the box below, or if there is no defined number of years check the box that the hold harmless provision will continue indefinitely.*

Years schools held harmless

☐ Hold harmless provision will continue indefinitely

**32. Please indicate the extent to which you agree with the following statements regarding school-level per-pupil funding systems and school choice systems.**

*Please select only one answer per row.*

	Strongly Disagree	Disagree	Agree	Strongly Agree
a. In districts with school choice, having a school-level funding system helps ensure schools of different types are funded fairly.	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
b. Having a school-level per-pupil funding system promotes increased use of school choice policies.	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
c. Charter schools receive funds through the school-level per-pupil funding system according to the same formula that other schools do.	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

**33. Has your district discussed or engaged in applying actual rather than average teacher salaries to school budgets?**

*Please select only one answer.*

☐ No, this has not been discussed. Our district applies average teacher salaries to school budgets.

☐ No, this has not been discussed. Our district does not change teacher salaries to school site budgets

☐ Yes, this has been discussed, but there are no firm plans to do so. Our district applies average teacher salaries to school budgets.

☐ Yes, this has been discussed and there are plans in place to move from average to actual teacher salaries in the near future.

☐ Yes, this has been discussed and we currently apply actual teacher salaries to school budgets.

**34. Please select title that best represents your primary position within your district.**

*Please select only one. If you have more than one job title, please select the title on the job that you spend a majority of your time.*

- ☐ Assistant Superintendent
- ☐ Budget Director
- ☐ Chief Academic Officer
- ☐ Chief Budget Officer/Chief Financial Officer
- ☐ Communications of Public Information Director
- ☐ Federal Program Administrator
- ☐ Finance Director
- ☐ Non-Federal Program Administrator
- ☐ Research Administrator
- ☐ Superintendent
- ☐ Other, please specify below:

**35. Please select the titles of all of the staff that assisted you in completing this survey.**

*Please select all that apply. If no one provided assistance, please select "None of the above."*

- ☐ Administrative Assistant/Secretary
- ☐ Assistant Principal/Vice Principal
- ☐ Assistant Superintendent
- ☐ Budget Director
- ☐ Chief Academic Officer
- ☐ Chief Budget Officer/Chief Financial Officer
- ☐ Communications of Public Information Director
- ☐ Federal Program Administrator/Manager
- ☐ Finance Director
- ☐ Non-Federal Program Administrator/Manager
- ☐ Principal
- ☐ Research Administrator
- ☐ School Board President/Member
- ☐ Superintendent
- ☐ Other, please specify below:

- ☐ Other, please specify below:

- ☐ None of the above.

***Thank you for completing this survey. Your participation is greatly appreciated.***

**[PAPER VERSION ONLY]**

**RETURN INSTRUCTIONS**

Please return your completed survey in the enclosed postage paid, pre-addressed envelope.

If you have misplaced your return envelope, please mail your survey to:

**American Institutes for Research  
Study of Weighted Student Funding and  
School-Based Budgeting Systems  
P.O. BOX #####  
Washington, DC 20007]**