

Discussion with Directors of Schools

# The Tennessee Investment in Student Achievement (TISA)



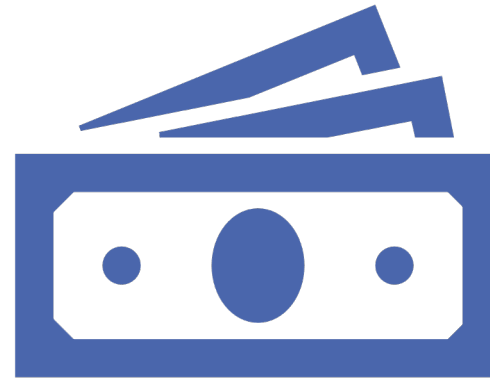
# Session Overview

- I. Fiscal Capacity (Bill Fox from CBER at UT)
- II. Brief Bill Overview
- III. TISA Calculations
- IV. Projections
- V. Path Forward and Q&A

\*There are notecards on the tables. To ensure everyone has a chance to ask their questions, please write your questions on the notecards. We will collect these cards throughout the session and answer them. This will ensure everyone has an opportunity to ask a question (especially those who may not want to ask in a large group!)



# Bill Overview



# Bill Overview: Formula

Element	Amount
Base	\$6,860.00
WEIGHTS	Weight
Econ. Disadvantaged	25%
Concentrated Poverty	5%
Small	5%
Sparse	5%
Charter	4%
ULN 1	15%
ULN 2	20%
ULN 3	40%
ULN 4	60%
ULN 5	70%
ULN 6	75%
ULN 7	80%
ULN 8	100%
ULN 9	125%
ULN 10	150%
DIRECT	
K-3 Literacy	\$500.00
4th Grade Tutoring	\$500.00
CTE	\$5,000.00
Postsecondary (ACT)	\$185.34

- Each student generates: (1) base, (2) eligible weights, (3) eligible direct funding)
- Outlines the weight percentages
  - **Amendment:** Removes charter weight
- Names the direct funding categories
  - **Amendment:** Adds students in the “approaching” category
- Outlines the progressive funding for CTE
- Outlines that students are funded for the duration of membership in the LEA
- Restricts salary allocations from the General Assembly to those evaluated on the TEAMS rubric.
- Remains prior school year data
- **Amendment:** Most rules have SBE providing a positive, neutral or negative recommendation. This is a decision based on SBE input and preferences.

# Bill Overview: Additional Funding

## Outcomes

- Outcomes funding will be based on appropriations and on funds typically reverted to the state
- Funding for each student who meets an outcome indicator, but district discretion on use
- TDOE will convene a group annually to provide recommendations for outcomes funding.

## Fast Growing

- Fast growth funding for enrollment growth over 1.25%
- Fast growth infrastructure funding for districts with 3 consecutive years above 2%
- Funding would be current year and allocated more frequently

# Bill Overview: Fiscal Capacity and Local Contribution

## Distribution

- No change to frequency
- For **4 declining enrollment districts ONLY**, if Y1 TISA allocations are less than the FY23 allocation, there will be a gradual stairstep down. In Y1 - 100%; in Y2 - 75%; in Y3 – 50%; in Y4 – 25%.
- If a district funding decreases more than 5% from one year to the next, the state will cover the balance.
- State support: (1) No MOE increase if the district is at-risk or distressed and (2) a small grant to cover the statutory change impacting one district a long time ago (only through the remainder of the bond)

## Fiscal Capacity and Local

- State and local share is 70/30 for the base and for the weights
- State covers 100% of direct and outcomes
- **Amendment:** Fiscal capacity is determined through CBER/TACIR average



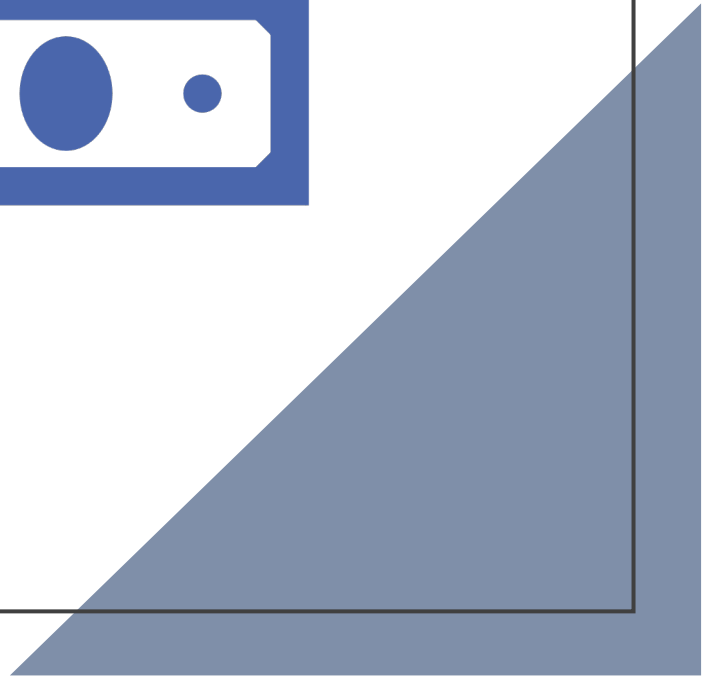
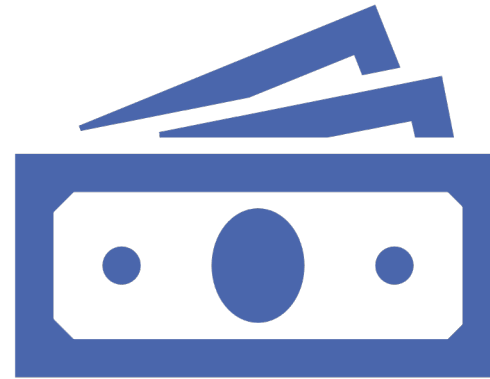
# Bill Overview: Professional Development

- No cost professional development required for:
  - Directors
  - School board members and public charter school governing body
  - State Board Members and Executive Director
  - Charter Commission Members and Executive Director
  - LEA, charter school, TDOE, state board or charter commission staff who handle annual budget
  - **House Amendment** – puts the assessment and passing back into the bill
- Department will make additional PD available for role-specific needs

# Bill Overview: Reporting and Requirements

- TISA Review: (1) TISA Review Committee and (2) Every district will have the opportunity to provide district-specific requests
- Annual Report: academic analysis, accountability report cards, executive summary and all recommendations, review of TISA
- Annual Comptroller Review and Report
- Accountability:
  - Each LEA will produce a report
  - LEAs with a “D” or “F” schools may be called before an ad-hoc committee.
    - Filed senate amendment moves this to the State Board for a hearing; requires a corrective action plan; requires the TDOE to audit and investigate.

# TISA Calculations



# TISA Calculator: Base Crosswalk

BEP FY23 Projected Allocations Workbook							
Instructional	TOTAL (no CDF)		Classroom	Total (no CDF)		Non-Classroom	Total (no CDF)
Classroom Teachers	\$ 2,750,454,144.51		Duty-Free Lunch	\$ 13,379,536.78		Superintendent	\$ 14,959,887.69
Principals	\$ 115,155,849.70		Textbooks	\$ 80,498,449.53		System Secretarial Support	\$ 67,723,114.67
Assistant Principals	\$ 46,331,336.98		Materials & Supplies - Regular	\$ 88,701,072.30		Tech Coordinators	\$ 20,986,711.96
Art/Music/PE	\$ 240,899,762.30		Instructional Equipment - Regular	\$ 77,497,307.28		Non-Instructional Equipment	\$ 25,489,412.27
Counselors	\$ 156,242,993.44		Classroom Related Travel - Regular	\$ 14,717,589.51		Capital Outlay	\$ 817,292,761.53
Social Workers	\$ 33,556,705.86		Technology	\$ 40,000,000.00		Custodians	\$ 188,847,987.83
Psychologists	\$ 27,168,147.04		Nurses	\$ 24,176,982.36		Maintenance and Operations, Personnel	\$ 339,558,793.75
Librarian	\$ 124,363,718.43		Instructional Assistants	\$247,946,870.84		Transportation Personnel	\$ 208,677,038.98
Regular Supervisors	\$ 77,063,534.03		Substitute Teachers	\$ 65,387,556.45		Maintenance and Operations, Other	\$ 167,189,629.03
Response to Intervention	\$ 26,138,341.09		Alternative School	\$ 20,153,837.28		Transportation Other	\$ 188,369,442.51
TOTAL	\$ 3,597,374,533.38		Library Assistants	\$ 18,135,518.59		School Secretary	\$ 132,768,730.87
			Total	\$ 690,594,720.93		TOTAL	\$ 2,171,863,511.10
Allocation Projections							
Projected Allocations BEP FY23+Grants	\$ 7,749,860,976.00	*					
Total - At Risk, SPED, EL	\$ 1,056,591,573.29						
Total - CTE, ACT, Industry Certs	\$ 197,378,580.91						
TOTAL Projected Allocated BEP+Grants	\$ 6,495,890,821.79						
TISA Base	\$6,621,689,744.79						
Difference from FY23	\$125,798,923.00						
*Grants: This number is the total of the 3 sections above PLUS Coordinated School Health, Family Resource Centers, and Safety.							
*This does not include cost differential factor or stabilization for BEP or TISA.							
Note: The BEP does not work as a per-pupil allocation, given that every student receives a different amount based on grade, school size, district size, and district location.							



# TISA Calculator: Weights and Direct Crosswalk

<u><b>Other Parts of the Formula</b></u>					
<b>Instructional - Weights</b>					
SPED Teachers, Supervisors, Assessment	\$ 464,699,777.53				
EL Instructors/Translators	\$ 236,738,843.07		<u><b>Allocation Projections: Weights</b></u>		
<b>Instructional - Direct</b>			<b>Projected Allocations (At Risk, SPED, EL)</b>	\$ 1,056,591,573.29	
CTE Teachers, Supervisors	\$ 175,806,389.09		<b>TISA Allocation</b>	\$ 1,767,111,708.00	
			Difference from FY23	\$ 710,520,134.71	
<b>Classroom - Weights</b>					
Instructional Equipment - SPED	\$ 3,194,237.83				
Classroom Related Travel - SPED	\$ 3,146,807.68		<u><b>Allocation Projections: Direct Funding</b></u>		
SPED Assistants	\$ 20,819,925.23		<b>Projected Allocations (CTE, Certs, ACT)</b>	\$ 197,378,580.91	
Materials & Supplies - SPED	\$ 6,658,462.64		<b>TISA Allocation</b>	\$ 375,574,415.92	
At-Risk	\$ 321,333,519.31		Difference from FY23	\$ 178,195,835.01	
<b>Classroom - Direct</b>					
Instructional Equipment - CTE	\$ 5,373,332.79				
Classroom Related Travel - CTE	\$ 2,121,771.10		<u><b>Allocation Projections: Outcomes</b></u>		
CTE Center Transport	\$ 990,937.20		<b>Projected Allocations</b>	\$ -	
Materials & Supplies - CTE	\$ 6,627,908.73		<b>TISA Allocation</b>	\$ 80,000,000.00	
Materials & Supplies - Industry Cert	\$ 190,202.00		Difference from FY23	\$ 80,000,000.00	
Materials & Supplies - ACT	\$ 6,268,040.00		*Note: Funding previously scheduled for reversion would be <u>added</u> to this total.		

# TISA Calculator

- Please go to: <https://www.tn.gov/education/tnedufunding.html> and click on “TISA Calculator.” A spreadsheet should populate. That is what we will be using. If you would prefer to do by hand, we have printouts available as well.
- Please have your data ready to enter. NOTE: You have your most recent data. The TDOE produced projections based on your trends and periods 1 and 2.

# TISA Calculator

- STEP 1: Enter your total ADM in the first green box (shown in the blue square).
- STEP 2: Enter your total ADM for economically disadvantaged students (shown in the red box).
- STEP 3: Enter your total ADM for students enrolled in Title I eligible schools (shown in the orange box).

TISA - FY24 Projections						
Element	Amount		Students/Services			Funding
Base	\$6,860.00	x	# of eligible students	=		
WEIGHTS						
	Weight		Students/Services			Funding
Econ. Disadvantaged	25%	x	# of eligible students	x \$6860	=	
Concentrated Poverty	5%	x	# of eligible students	x \$6860	=	
Small	5%	x	# of eligible students	x \$6860	=	
Sparse	5%	x	# of eligible students	x \$6860	=	
Charter	4%	x	# of eligible students	x \$6860	=	
ULN 1	15%	x	# of eligible students	x \$6860	=	
ULN 2	20%	x	# of eligible students	x \$6860	=	
ULN 3	40%	x	# of eligible students	x \$6860	=	
ULN 4	60%	x	# of eligible students	x \$6860	=	
ULN 5	70%	x	# of eligible students	x \$6860	=	
ULN 6	75%	x	# of eligible students	x \$6860	=	
ULN 7	80%	x	# of eligible students	x \$6860	=	
ULN 8	100%	x	# of eligible students	x \$6860	=	
ULN 9	125%	x	# of eligible students	x \$6860	=	
ULN 10	150%	x	# of eligible students	x \$6860	=	
DIRECT						
K-3 Literacy	\$500.00	x	# of eligible students		=	
4th Grade Tutoring	\$500.00	x	# of eligible students		=	
CTE	\$5,000.00	x	# of eligible students		=	
Postsecondary (ACT)	\$185.34	x	# of eligible students		=	
OTHER FUNDING						
Outcomes Funding						Calculated annually
Fast-Growing Funding						Calculated annually
TOTAL						ADD THIS COLUMN FOR THE TOTAL

# TISA Calculator

- STEP 4: If you are a small district, put your total ADM in that box.
- STEP 5: If you are a sparse district, put your total ADM in that box.
- STEP 6: For each of the ULN categories, we recommend using the TDOE's numbers. However, you may also use the following as placeholders:
  - **Special Education:** Please use the crosswalk document provided
  - **ELs:** Please use the crosswalk document provided.
  - **Dyslexia:** Enter your ADM with characteristics of dyslexia (no IEP). If you are not sure, use 5% of your ADM. This number is added to ULN 2.

TISA - FY24 Projections						
Element	Amount		Students/Services			Funding
Base	\$6,860.00	x	# of eligible students	=		
WEIGHTS	Weight		Students/Services			Funding
Econ. Disadvantaged	25%	x	# of eligible students	x \$6860	=	
Concentrated Poverty	5%	x	# of eligible students	x \$6860	=	
Small	5%	x	# of eligible students	x \$6860	=	
Sparse	5%	x	# of eligible students	x \$6860	=	
<del>Charter</del>	<del>4%</del>	<del>x</del>	<del># of eligible students</del>	<del>x \$6860</del>	<del>=</del>	
ULN 1	15%	x	# of eligible students	x \$6860	=	
ULN 2	20%	x	# of eligible students	x \$6860	=	
ULN 3	40%	x	# of eligible students	x \$6860	=	
ULN 4	60%	x	# of eligible students	x \$6860	=	
ULN 5	70%	x	# of eligible students	x \$6860	=	
ULN 6	75%	x	# of eligible students	x \$6860	=	
ULN 7	80%	x	# of eligible students	x \$6860	=	
ULN 8	100%	x	# of eligible students	x \$6860	=	
ULN 9	125%	x	# of eligible students	x \$6860	=	
ULN 10	150%	x	# of eligible students	x \$6860	=	
DIRECT						
K-3 Literacy	\$500.00	x	# of eligible students		=	
4th Grade Tutoring	\$500.00	x	# of eligible students		=	
CTE	\$5,000.00	x	# of eligible students		=	
Postsecondary (ACT)	\$185.34	x	# of eligible students		=	
OTHER FUNDING						
Outcomes Funding						Calculated annually
Fast-Growing Funding						Calculated annually
TOTAL						ADD THIS COLUMN FOR THE TOTAL



# TISA Calculator

- STEP 7: Put the total ADM of students in K – 3<sup>rd</sup> grade in the line labeled “K-3 Literacy”
- STEP 8: Put the total ADM of students in K – 3<sup>rd</sup> grade in the line labeled “4<sup>th</sup> Grade Tutoring”
- STEP 9: Put the total ADM currently in CTE programs in the line labeled “CTE”
- STEP 10: This is the current actual cost of the ACT and ACT retake.

TISA - FY24 Projections						
Element	Amount		Students/Services			Funding
Base	\$6,860.00	x	# of eligible students	=		
WEIGHTS	Weight		Students/Services			Funding
Econ. Disadvantaged	25%	x	# of eligible students	x \$6860	=	
Concentrated Poverty	5%	x	# of eligible students	x \$6860	=	
Small	5%	x	# of eligible students	x \$6860	=	
Sparse	5%	x	# of eligible students	x \$6860	=	
<del>Charter</del>	<del>4%</del>	<del>x</del>	<del># of eligible students</del>	<del>x \$6860</del>	<del>=</del>	
ULN 1	15%	x	# of eligible students	x \$6860	=	
ULN 2	20%	x	# of eligible students	x \$6860	=	
ULN 3	40%	x	# of eligible students	x \$6860	=	
ULN 4	60%	x	# of eligible students	x \$6860	=	
ULN 5	70%	x	# of eligible students	x \$6860	=	
ULN 6	75%	x	# of eligible students	x \$6860	=	
ULN 7	80%	x	# of eligible students	x \$6860	=	
ULN 8	100%	x	# of eligible students	x \$6860	=	
ULN 9	125%	x	# of eligible students	x \$6860	=	
ULN 10	150%	x	# of eligible students	x \$6860	=	
DIRECT						
K-3 Literacy	\$500.00	x	# of eligible students		=	
4th Grade Tutoring	\$500.00	x	# of eligible students		=	
CTE	\$5,000.00	x	# of eligible students		=	
Postsecondary (ACT)	\$185.34	x	# of eligible students		=	
OTHER FUNDING						
Outcomes Funding						Calculated annually
Fast-Growing Funding						Calculated annually
TOTAL					ADD THIS COLUMN FOR THE TOTAL	

# TISA Calculator: Sample Outcomes

If you would like to benchmark your outcomes funding, you can use the outcomes handout to make the same calculations.

- Literacy:
  - Total not economically disadvantaged 3<sup>rd</sup> grade TCAP On-Track or Mastered x \$6860 x 20%.
  - Total economically disadvantaged 3<sup>rd</sup> grade TCAP On-Track or Mastered x \$6860 x 40%.
- ACT Score of 21 or significant improvement (to be defined, but you can use 1.5 points as a starter)
  - Same formula as above
- Industry Credentials (Level 2 or 3)
  - Same formula as above
- Post High School Attainment
  - All students who enroll in a post high school program would generate \$6860 x 5%

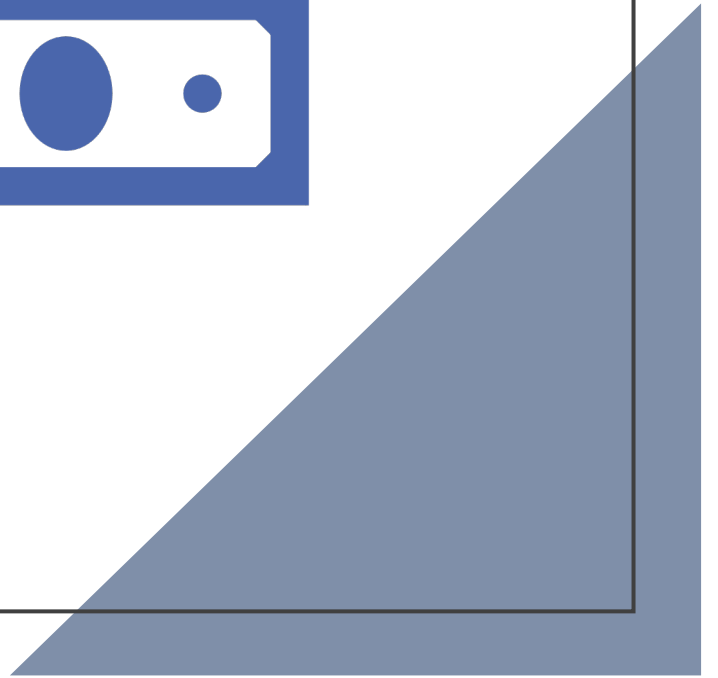
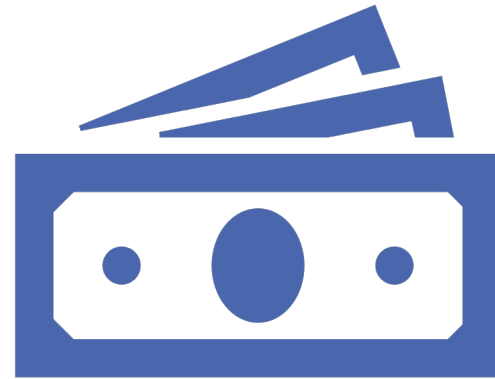
Category		Outcome	Dollar Amount	Percent of Students
Literacy	Not Economically Disadvantaged	Base x 20%	\$1,372	45.9
	Economically Disadvantaged	Base x 40%	\$2,744	21.73
ACT Score of 21 <sup>1</sup> or Industry Credentials	Not Economically Disadvantaged	Base x 20%	\$1,372	34.77
	Economically Disadvantaged	Base x 40%	\$2,744	6.93
Post High School	All Students	Base x 5%	\$343	42

# TISA Calculator

If you are one of the fast-growing districts, the TDOE would be happy to provide you with those projected amounts.

Salary equity funding will not change compared to current calculations.

# Projections





# Definitions

- 1. Local Share:** Portion of all formula-generated funds to be covered *collectively* by local funding bodies
  - BEP: 70/30 Instructional; 75/25 Classroom; 50/50 Non-Classroom
  - TISA: 70/30 Base and Weights
- 2. Fiscal Capacity:** County's ability to pay as determined by TACIR/CBER models
- 3. Local Contribution:** District local funding responsibility determined by multiplying local share by county's fiscal capacity

# Local Contribution Calculation

For a given component of the funding formula:

$$\begin{aligned} &\text{Total of Statewide Funding Generated for Component} \\ &\times \text{Local Share Split} \\ &\times \text{County Fiscal Capacity} \\ \hline &= \text{Local Contribution} \end{aligned}$$

Marshall County			
Basic Education Program Allocation			
2020-2021			
January Revised			
<b>Instructional Salaries Funding</b>			
Total Full Funding - Instructional		\$16,864,000	
Less: Required Local Matching Funds Marshall County	2	→ (1) \$ 3,525,000	5
<b>State Share of Instructional Funding 20.90%</b>		<b>\$13,339,000</b>	
<b>0.753967899137122 Instructional Benefits Funding</b>			
Total Full Funding - Instructional		\$5,503,000	
Less: Required Local Matching Funds Marshall County	2	→ (2) \$ 1,150,000	5
<b>State Share of Instructional Funding 20.90%</b>		<b>\$4,353,000</b>	
<b>0.753967899137122 Classroom Funding</b>			
Total Full Funding - Classroom		\$5,233,000	
Less: Required Local Matching Funds Marshall County	2	→ (3) \$ 937,000	4
<b>State Share of Classroom Funding 17.91%</b>		<b>\$4,296,000</b>	
<b>Non-Classroom Funding</b>			
Total Full Funding - Non-Classroom		\$11,516,000	
Less: Required Local Matching Funds Marshall County	2	→ (4) \$ 3,837,000	3
<b>State Share of Non-Classroom Funding 33.32%</b>		<b>\$7,679,000</b>	
<b>Total State BEP Funding Allocation</b>	(1) + (2) + (3) + (4)	<b>\$29,667,000</b>	(5)
FY20 Local Contribution			
Total Required Local Matching Funds		9,449,000	(6) 11,836,249
Total BEP Funding - State and Local		\$39,116,000	(5) + (6)
<b>Additional Information</b>			
<b>Student Counts (Weighted average of months 2,3,6 and 6)</b>		<b>2019-20</b>	<b>2018-19</b>
Total ADMs		5344.95625	5368.155
Career and Technical ADMs Served		251.7893515	237.9967443
Special Education ADMs Identified and Served		888.58	836.44875
<b>FY21 Increase in Instructional Salary Funds</b>		<b>\$0</b>	
<b>System FY19 Weighted Average Salary</b>		<b>\$48,596</b>	
<b>Statewide FY19 Weighted Average Salary</b>		<b>\$47,134</b>	
<b>Required Instructional Salary Budget Increase</b>		<b>\$0</b>	
<b>IEA Program - per pupil amount</b>		<b>\$7,318</b>	
<b>Fiscal Capacity Indices</b>			
<b>TACIR Index</b>	1	0.361%	
<b>CBER/Fox Index</b>		0.368%	
<b>TACIR 50% &amp; CBER 50%</b>		0.365%	

# TISA – Local Contribution

Note: Calculations are the same steps as the BEP and only apply to the base and to the weights.

Math Behind the Calculations:

1. Statewide Totals for Component
2. x Local Share % (30% in TISA)
3. x County Fiscal Capacity
4. Local Contribution

Marshall County - TISA Local Contribution									
BASE					WEIGHTS				
1	→	Statewide Total		\$ 6,613,348,718.73				\$ 1,762,431,272.86	
2	→	Multiply by Local Share %	x	30%			x	30%	
		Statewide Local Share	=	\$ 1,984,004,615.62			=	\$ 528,729,381.86	
		Statewide Local Share		\$ 1,984,004,615.62				\$ 528,729,381.86	
3	→	Marshall Fiscal Capacity	x	0.37%			x	0.37%	
		Marshall Local Contribution	=	\$ 7,304,287.81			=	\$ 1,946,563.81	
4	→	Total Local Contribution		\$ 7,304,287.81		+		\$ 1,946,563.81	
						=		\$ 9,250,851.62	

# Where do I find those numbers?

## District Allocation

As a result of this student-based formula and the data shared by your district with the department, your allocation under the TISA is reflected below. Please note this does not include fast-growth funding, outcomes funding, or the additional funding your district may spend on education. This only reflects the base, weights, and direct funding outlined in the new formula proposal, based on the data your district has submitted. Please note this is a projection and enrollment changes will impact any numbers two years from now.

TISA - FY24 Projections				
District	Marshall County	District ID	590	County
Element	Amount	Students		Funding
Base	\$ 6,860.00	5,223.42		\$35,832,676.46
WEIGHTS	Weight	Students/Services		Funding
Economically Disadvantaged	25%	1,353.26		\$2,320,833.95
Concentrated Poverty	5%	3,113.28		\$1,067,854.92
Small	5%	0.00		\$0.00
Sparse	5%	5,223.42		\$1,791,633.82
Charter	4%	0.00		\$0.00
Unique Learning Need 1	15%	244.76		\$251,860.05
Unique Learning Need 2	20%	421.46		\$578,245.44
Unique Learning Need 3	40%	183.73		\$504,161.01
Unique Learning Need 4	60%	5.98		\$24,609.73
Unique Learning Need 5	70%	130.54		\$626,864.43
Unique Learning Need 6	75%	164.74		\$847,612.82
Unique Learning Need 7	80%	63.99		\$351,187.64
Unique Learning Need 8	100%	0.00		\$0.00
Unique Learning Need 9	125%	72.34		\$620,306.11
Unique Learning Need 10	150%	1.00		\$10,254.05
DIRECT	Amount	Students		Funding
K-3 Literacy	\$ 500.00	\$1,508.03		\$754,016.68
4th Grade Tutoring	\$ 500.00	\$85.91		\$42,955.38
CTE	\$ 5,000.00	\$236.69		\$1,183,472.39
Post-Secondary Assessment	\$ 185.34	\$377.61		\$69,986.00
OUTCOMES				
TBD				
TOTAL				\$46,878,530.88

Fiscal Comparisons			
	FY24 TISA	FY23 Funding*	Change
Overall Funding	\$46,878,530.88	\$40,927,171.52	\$5,951,359.36
Required Local Match	\$9,250,851.62	\$9,934,170.00	Decreases
Maintenance of Effort		\$11,836,249.00	No Change

\*Note: FY23 funding include both BEP projections and grants outside the BEP.

Fiscal Comparisons			
	FY24 TISA	FY23 Funding*	Change
Overall Funding	\$46,878,530.88	\$40,927,171.52	\$5,951,359.36
Required Local Match	\$9,250,851.62	\$9,934,170.00	Decreases
Maintenance of Effort		\$11,836,249.00	No Change

\*Note: FY23 funding include both BEP projections and grants outside the BEP.

## Local Contribution – Multi-System Counties

1. Apply same calculation to determine county total (all systems included)
2. For each component, determine proportion of total funds generated by each system
3. Apply the resulting % by the county (all systems) local contribution to determine system level responsibility

1

2

3

Tullahoma City Schools - TISA Local Contribution						
BASE			WEIGHTS			
Statewide Total		\$ 6,613,348,718.73			\$ 1,762,431,272.86	
Multiply by Local Share %	x	30%		x	30%	
Statewide Local Share	=	\$ 1,984,004,615.62		=	\$ 528,729,381.86	
Statewide Local Share		\$ 1,984,004,615.62			\$ 528,729,381.86	
Coffee Co Fiscal Capacity	x	0.71%		x	0.71%	
Coffee Co (All Systems)	=	\$ 14,170,241.88		=	\$ 3,776,313.41	
System Proportion of Funds						
Tullahoma		\$ 24,182,760.25	39%		\$ 4,739,107.26	30%
Manchester	+	\$ 9,915,448.57	16%	+	\$ 3,087,608.26	19%
Coffee Co	+	\$ 28,039,328.71	45%	+	\$ 8,224,750.73	51%
TOTAL	=	\$ 62,137,537.52		=	\$ 16,051,466.24	
Coffee Co (All Systems)		\$ 14,170,241.88			\$ 3,776,313.41	
Tullahoma Proprtion	x	39%		x	30%	
Tullahoma Local Contribution	=	\$ 5,514,791.47		=	\$ 1,114,935.80	
		\$ 5,514,791.47		+	\$ 1,114,935.80	
		Total		=	\$ 6,629,727.27	
Tullahoma		Total (Base, Weights, Direct)			\$ 30,295,964.61	
			Local	-	\$ 6,629,727.27	
			Stat		\$ 23,666,237.34	

# TISA Projections

- **Data Sources** - District submitted data in EIS and ePlan used for projections:
  - 5 Year Trend: Based on average change in ADMs used in BEP from FY15-FY20
  - ADM: Counts reported for Period 2 &3 as of January 5<sup>th</sup> adjusted by 5 year trend
  - Economically Disadvantaged, English Learners: October 1 federally reported counts in FY21 adjusted by 5 year trend
  - Concentrated Poverty (Title I Eligible Schools): District determined poverty method used for Title I spiraling in ePlan (e.g. direct cert, FRPL, household survey, etc.)
  - MOE: District submitted in ePlan, adjusted for FY23 BEP projection if applicable
- **Out Year Assumptions:**
  - 5 Year Trends in ADM change will continue
  - No other additional funds added beyond FY24 except for ADM growth
- **Reminder:** These inputs will continue to change as districts finalize 2021-2022 school year data.



## Future Year TISA Projections

District	Marshall County Schools		County	Marshall	5 Year Average Change in Enrollment (FY16-20)		0.388%	
Projections	FY23 (BEP+Grants)	FY24	FY25	FY26	FY27	FY28	FY29	FY30
ADM	5,203.23	5,223.42	5,243.69	5,264.04	5,284.46	5,304.97	5,325.55	5,346.22
TISA Total	\$40,927,171.52	\$46,878,530.88	\$47,060,431.63	\$47,243,038.21	\$47,426,353.35	\$47,610,379.80	\$47,795,120.32	\$47,980,577.68
State	\$30,993,001.52	\$37,627,679.26	\$37,799,765.13	\$37,966,179.65	\$38,127,239.41	\$38,283,456.94	\$38,435,190.66	\$38,582,667.48
Local	\$9,934,170.00	\$9,250,851.62	\$9,260,666.50	\$9,276,858.56	\$9,299,113.94	\$9,326,922.86	\$9,359,929.66	\$9,397,910.19
Projected MOE	\$11,836,249.00							

\*Denotes projected fiscal year in which local required contribution will exceed FY23 projected local contribution levels. The lack of “\*” signals that the local requirement will not exceed projected FY23 levels until after FY30.

\*\*Denotes projected fiscal year in which local required contribution will exceed FY23 projected maintenance of effort levels. The lack of “\*\*” signals that the local requirement will not exceed projected FY23 MOE levels until after FY30.

### Key Points

1. Local contributions would be reset under TISA beginning in FY24. If your local contribution goes down, then that difference is made up with new state funds.
2. Until your local contribution exceeds your MOE, this formula would not necessitate an increase in MOE.
3. If additional funds are added in future years, districts would experience similar increases in local contribution as they do under the BEP.

# Projections & Fiscal Capacity

How should I think about this if I am a district with.....

- Enrolment growth
- Declining enrollment
- Increased sales taxes (especially online purchases)
- Increase property values



## **Tennessee Department of Education**

710 James Robertson Parkway  
Nashville, TN 37243





# Appendix

# Biggest Take-aways

- **Districts:** Districts would receive more funding under the TISA than they would under the BEP (assuming stable enrollment).
- **Local:** The total (statewide) local contribution does not increase for another 4 years. In FY27, the increase is similar to what districts would normally experience.

**Note:** If the General Assembly were to put \$1B into the BEP, it would mean ~25% of LEAs would need to increase taxes.

# Tennessee Investment in Student Achievement is designed to...



**Empower each student to read proficiently by third grade.**



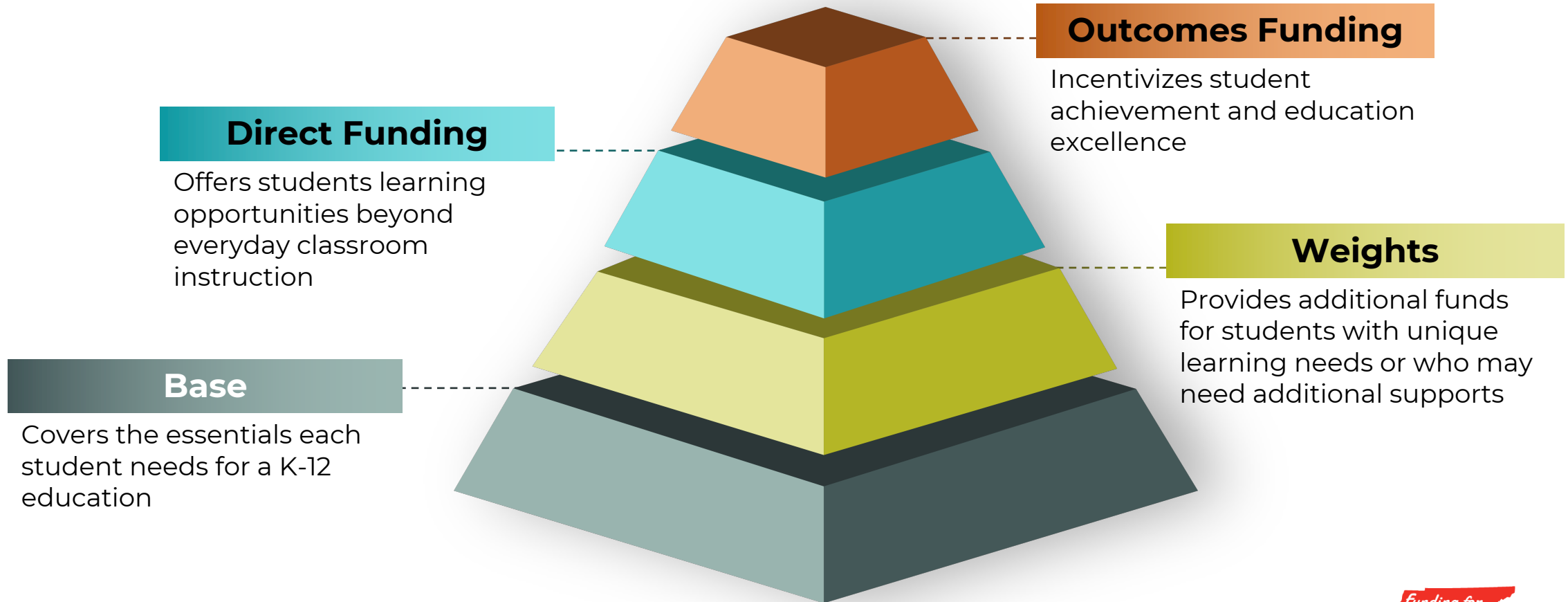
**Prepare each high school graduate to succeed in the postsecondary program or career of the graduate's choice.**



**Provide each student with the resources needed to succeed, regardless of the student's individual circumstances.**

# Framework of A Student-based Formula

Base + Weights + Direct + Outcomes



TISA - FY24 Projections						
Element	Amount		Students/Services		Funding	
Base	\$6,860.00	x	# of eligible students	=		
WEIGHTS	Weight		Students/Services		Funding	
Econ. Disadvantaged	25%	x	# of eligible students	x \$6860	=	
Concentrated Poverty	5%	x	# of eligible students	x \$6860	=	
Small	5%	x	# of eligible students	x \$6860	=	
Sparse	5%	x	# of eligible students	x \$6860	=	
Charter	10%	x	# of eligible students	x \$6860	=	
ULN 1	15%	x	# of eligible students	x \$6860	=	
ULN 2	20%	x	# of eligible students	x \$6860	=	
ULN 3	40%	x	# of eligible students	x \$6860	=	
ULN 4	60%	x	# of eligible students	x \$6860	=	
ULN 5	70%	x	# of eligible students	x \$6860	=	
ULN 6	75%	x	# of eligible students	x \$6860	=	
ULN 7	80%	x	# of eligible students	x \$6860	=	
ULN 8	100%	x	# of eligible students	x \$6860	=	
ULN 9	125%	x	# of eligible students	x \$6860	=	
ULN 10	150%	x	# of eligible students	x \$6860	=	
DIRECT						
K-3 Literacy	\$500.00	x	# of eligible students		=	
4th Grade Tutoring	\$500.00	x	# of eligible students		=	
CTE	\$5,000.00	x	# of eligible students		=	
Postsecondary (ACT)	\$185.34	x	# of eligible students		=	
OTHER FUNDING						
Outcomes Funding					Calculated annually	
Fast-Growing Funding					Calculated annually	
TOTAL				ADD THIS COLUMN FOR THE TOTAL		

# District Overview



TISA - FY24 Projections						
Element	Amount		Students/Services		Funding	
Base	\$6,860.00	x	# of eligible students	=		
WEIGHTS	Weight		Students/Services		Funding	
Econ. Disadvantaged	25%	x	# of eligible students	x \$6860	=	
Concentrated Poverty	5%	x	# of eligible students	x \$6860	=	
Small	5%	x	# of eligible students	x \$6860	=	
Sparse	5%	x	# of eligible students	x \$6860	=	
Charter	10%	x	# of eligible students	x \$6860	=	
ULN 1	15%	x	# of eligible students	x \$6860	=	
ULN 2	20%	x	# of eligible students	x \$6860	=	
ULN 3	40%	x	# of eligible students	x \$6860	=	
ULN 4	60%	x	# of eligible students	x \$6860	=	
ULN 5	70%	x	# of eligible students	x \$6860	=	
ULN 6	75%	x	# of eligible students	x \$6860	=	
ULN 7	80%	x	# of eligible students	x \$6860	=	
ULN 8	100%	x	# of eligible students	x \$6860	=	
ULN 9	125%	x	# of eligible students	x \$6860	=	
ULN 10	150%	x	# of eligible students	x \$6860	=	
DIRECT						
K-3 Literacy	\$500.00	x	# of eligible students		=	
4th Grade Tutoring	\$500.00	x	# of eligible students		=	
CTE	\$5,000.00	x	# of eligible students		=	
Postsecondary (ACT)	\$185.34	x	# of eligible students		=	
OTHER FUNDING						
Outcomes Funding					Calculated annually	
Fast-Growing Funding					Calculated annually	
TOTAL				ADD THIS COLUMN FOR THE TOTAL		

70/30 Split Each  
State/Local

All State

# District Overview

# Example Elementary Students



**Student 1**

Characteristic	Eligible?	Value
Base	✓	\$6,860
Economically Disadvantaged		
Concentration of Poverty		
Sparse		
Small		
Unique Learning Need	✓	Base x 20%
K – 3 <sup>rd</sup> Grade Student	✓	\$500
4 <sup>th</sup> Grade Tutoring		
CCTE		
Post-Secondary Assessment		

**TOTAL FUNDING: \$8,732**



**Student 2**

Characteristic	Eligible?	Value
Base	✓	\$6,860
Economically Disadvantaged	✓	Base x 25%
Concentration of Poverty	✓	Base x 5%
Sparse	✓	Base x 5%
Small	✓	Base x 5%
Unique Learning Need	✓ ✓	Base x 60% Base x 20%
K – 3 <sup>rd</sup> Grade Student		
4 <sup>th</sup> Grade Tutoring	✓	\$500
CCTE		
Post-Secondary Assessment		

**TOTAL FUNDING: \$15,592**

# Example High School Students



**Student 5**

Characteristic	Eligible?	Value
Base	✓	\$6,860
Economically Disadvantaged	✓	Base x 25%
Concentration of Poverty	✓	Base x 5%
Sparse		
Small		
Unique Learning Need	✓	Base x 40%
K – 3 <sup>rd</sup> Grade Student		
4 <sup>th</sup> Grade Tutoring		
CCTE	✓	\$6,000
Post-Secondary Assessment	✓	\$185

**TOTAL FUNDING: \$17,847**



**Student 6**

Characteristic	Eligible?	Value
Base	✓	\$6,860
Economically Disadvantaged		
Concentration of Poverty		
Sparse	✓	Base x 5%
Small		
Unique Learning Need		
K – 3 <sup>rd</sup> Grade Student		
4 <sup>th</sup> Grade Tutoring		
CCTE	✓	\$4,000
Post-Secondary Assessment	✓	\$185

**TOTAL FUNDING: \$11,388**

# Other Education Funding: Fast-Growing

- **Fast-Growing Student Stipend**

LEAs with current-year growth above 1.25% from the prior year will receive same-year funding for the additional students.

- **Fast-Growing Infrastructure Stipend**

LEAs with 2% growth each year for three consecutive years may also receive an infrastructure stipend with remaining funds.



# \$125M

**to increase public school teachers' salaries in FY23, which will carry-over to the TISA base for salaries**

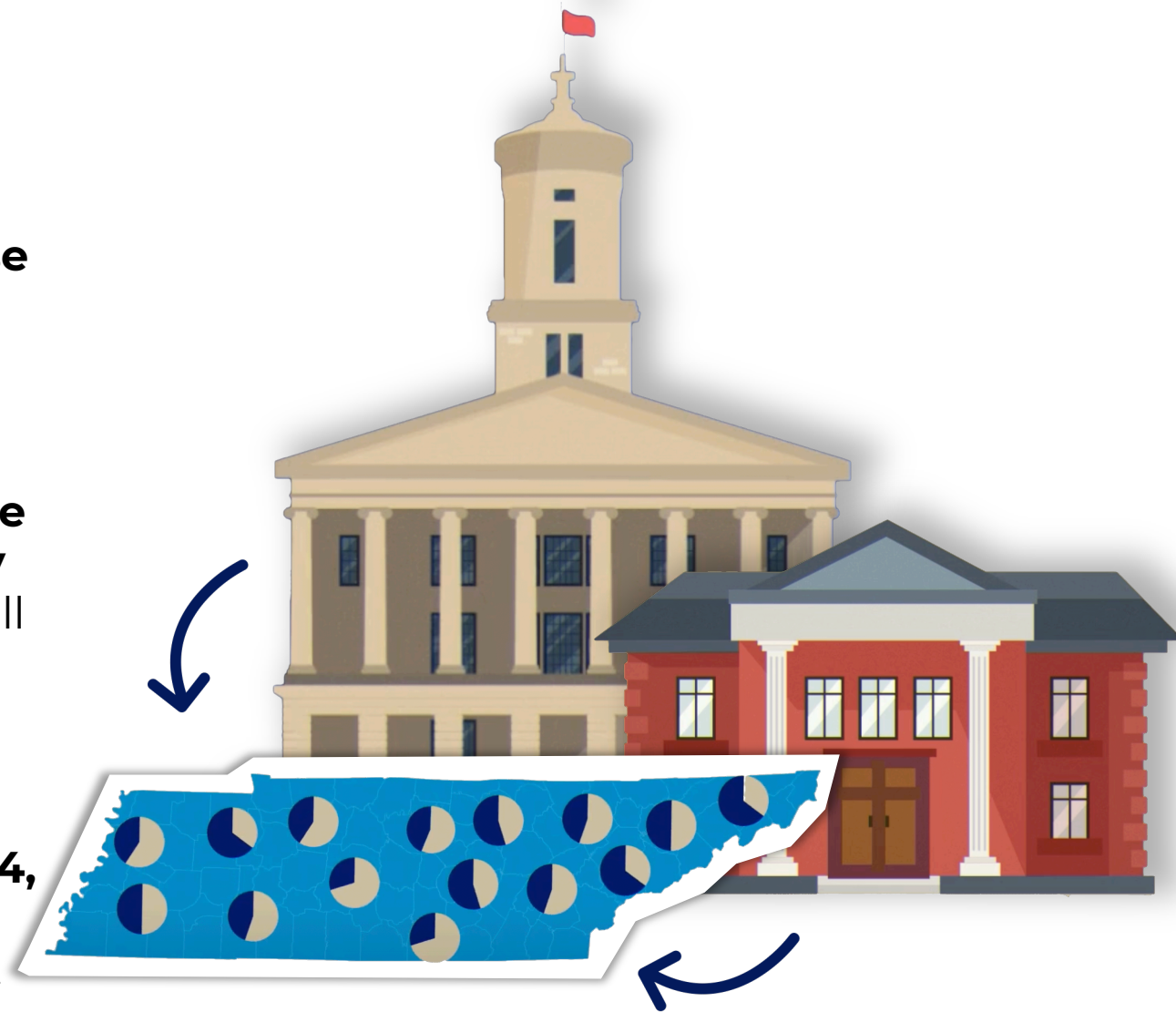
## Supporting Teachers

**Funds school support staff** so teachers can concentrate on academic instruction.

- **Provides for** the Governor and General Assembly to direct education funding **increases to go to raises for existing teachers.**
- **Requires** increases in education funding to also trigger **increases to state minimum salaries**, which is on-track to increase the state minimum salary \$10k from \$35,000 in Jan 2019 to \$45,000 by 2026.
- Maintains **salary equity.**

# Local Contribution & Fiscal Capacity

- **State and local share is split 70/30 for the base and weights only.** The state will cover direct funding, outcomes and fast-growing.
- **Fiscal capacity will be established by the current model (TACIR/CBER), evaluated by the Comptroller of the Treasury, and approved by the State Board each year.** The department will provide grants to help distressed and at-risk counties, and those with special circumstances related to maintenance of effort (MOE).
- **Local contributions are set to be lower in FY24, FY25, and FY26** and begin to increase again in FY27, in an amount similar to prior years so that the new state investment does not overwhelm local requirements. No changes to MOE.





# Improving Transparency and Accountability

- **School Boards**
  - Must establish academic goals that the local budget is intended to support
  - Must describe the results and return on investment of the prior year strategy
- **Districts and Public Charter Schools**
  - An LEA or public charter school with a D or F school may be asked to present to either an ad hoc Committee (House version) or the SBE (Senate version) to discuss funding and outcomes
  - The results may lead to no action, a corrective action plan, or an inspector general appointed to conduct additional auditing/investigation
  - This provision also includes all state-run districts and schools



# Improving Reporting

- **Detailed reporting on funding and spending** will be publicly posted at the school and district levels, per federal requirements, and be included on the annual report cards.
- **In addition to a committee, every LEA will have the opportunity to provide annual input on:**
  - What the LEA hopes to see funded
  - The research base and return on investment
  - Reasons why the LEA is unable to afford those resources in the existing budget.
- **The department will produce a report each year, to include:**
  - An academic analysis
  - Accountability report cards
  - LEA TISA Review requests
  - Comptroller review of TISA





# Professional Development

- **A professional development series on TISA will include training on:**
  - The TISA and TISA Guide
  - How to budget to increase achievement
  - How to connect achievement with investments
  - How to hold decision-makers accountable
- **Professional development for:**
  - Directors, state and local school board or governing board members, and state and local employees responsible for LEA and school budgets.
- **Optional professional development** will be provided at no cost for school employees related to maximizing investment to increase achievement



# Definitions

- **Economically Disadvantaged:** This is an *existing* definition, and includes a student who is eligible through [direct certification](#). It also includes homeless, foster, runaway, or migrant students who are categorically eligible. Information on the verification process can be found [here](#). This reflects current best practice.
- **Concentration of Poverty:** This definition means a student who attends a school that is [eligible](#) for [Title I](#) schoolwide designation (those with high numbers or high percentages of children from low-income families). As a note: these numbers closely match the data from the last time there was a statewide collection of free/reduced price meals, without asking all families to complete the complicated paperwork.
- **Small:** A [small](#) district means an LEA with 1,000 or fewer students. For comparison, the US Department of Education's [Small, Rural Schools Achievement Program](#), which provides small LEAs with funds to boost student achievement, is available only to districts enrolling fewer than 600 students. The Tennessee definition is 167% more generous than that. Further the median size (40<sup>th</sup> – 60<sup>th</sup> percentile) of school districts in the U.S. is approximately 1,000 students.
- **Sparse:** A sparse district means a county LEA with fewer than twenty-five students per square mile. The federal definition is ten per square mile, but subcommittee feedback suggested that this definition was more reflective of the needs of Tennessee students.

ULN	Weight	Current Special Education Option Code	English Learners (EL) and Characteristics of Dyslexia
1	15%	<b>Option 1 Consultation:</b> Minimum of 2 contacts/month, except OT/PT (minimum of 3 contacts/year). Time must be reported. Direct Services equal less than 1 hour/week. Related Services equal less than 1 hour/week. Related Services include: <i>Psychological, School Social Work, Speech/Language, School Health, Counseling, Vision, Hearing, Occupational and Physical Therapy</i> . NOTE: Recreation Therapy and Other Related Services are EXCLUDED.	
2	20%	<b>Option 2 Direct Services:</b> Direct Services more than or equal to 1, but less than 4 hours/week; or, any one Related Service more than or equal to 1, but less than 4 hours/week. Includes/Excludes same as Option 1.	Characteristics of Dyslexia English Learner Tier I
3	40%	<b>Option 3 Direct Services:</b> Direct Services more than or equal to 4, but less than 9 hours/week; or, any one Related Service more than or equal to 4, but less than 9 hours/week. Includes/Excludes same as Option 1.	
4	60%	N/A	English Learner Tier II
5	70%	N/A	English Learner Tier III
6	75%	<b>Option 4 Direct Services:</b> Direct Services more than or equal to 9, but less than 14 hours/week; or, any one Related Service more than or equal to 9, but less than 14 hours/week. Includes/Excludes same as Option 1.	
7	80%	<b>Option 5 Direct Services:</b> Direct Services more than or equal to 14, but less than 23 hours/week; or, any one Related Service more than or equal to 14, but less than 23 hours/week. Includes/Excludes same as Option 1.	
8	100%	<b>Option 6 Ancillary Services:</b> Attendant provided so that the student can have at least 4 hours/day in less restrictive and general education settings.	
9	125%	<b>Option 7 Direct Services:</b> Special Education services 23 or more hours/week; or, any one Related Service 23 or more hours/week. Includes/Excludes same as Option 1. <b>Option 8 Self-Contained or CDC:</b> The sum of all direct services plus related services listed below plus up to 10 hours/week of special education educational assistant in the general program equals 32.5 or more hours/week. In addition, at least two Related Services from those specified below must be received for at least the minimum times listed. <div><div>1 Hour/Week • Psychological Services • Counseling Services  3 contacts/year, with time span reported</div><div>• Speech/Language Services • Vision Services • Hearing Services  • Occupational Therapy • Physical Therapy</div></div>	
10	150%	<b>Option 9 Residential Services:</b> Provided at least 24 hours/day. <b>Option 10 Hospital / Homebound:</b> Provided 3 or more hours/week.	

# Unique Learning Needs

# English Learners

Weight Category	Path 1 No English proficiency and no formal schooling for the last 2 years.		Path 2 No English proficiency, with minimal literacy in the student's first language.	Individual Learning Plan?	Assessment?
Tier III: Language Focused Supports (ULN 5)	Up to 4 years	OR	Up to 3 years	YES	WIDA
Tier II: Academic and Career Readiness Focused Supports (ULN 4)	Up to 2 years		Up to 3 years	YES	WIDA and/or TCAP and/or Industry Credential
Tier I: Transition Supports (ULN 2)*	Long-term English Learner (LTEL): Students in year seven of school attendance who have not exited EL status by passing the WIDA assessment.  Students who have earned a passing score on the WIDA assessment and are transitioning. (Years 1 and 2 after testing out, as outlined in federal law).			YES	WIDA/TCAP

# Overall Funding Landscape

**\$9B** 

in total education  
funding for 2024  
(state and local)

**\$1B** 

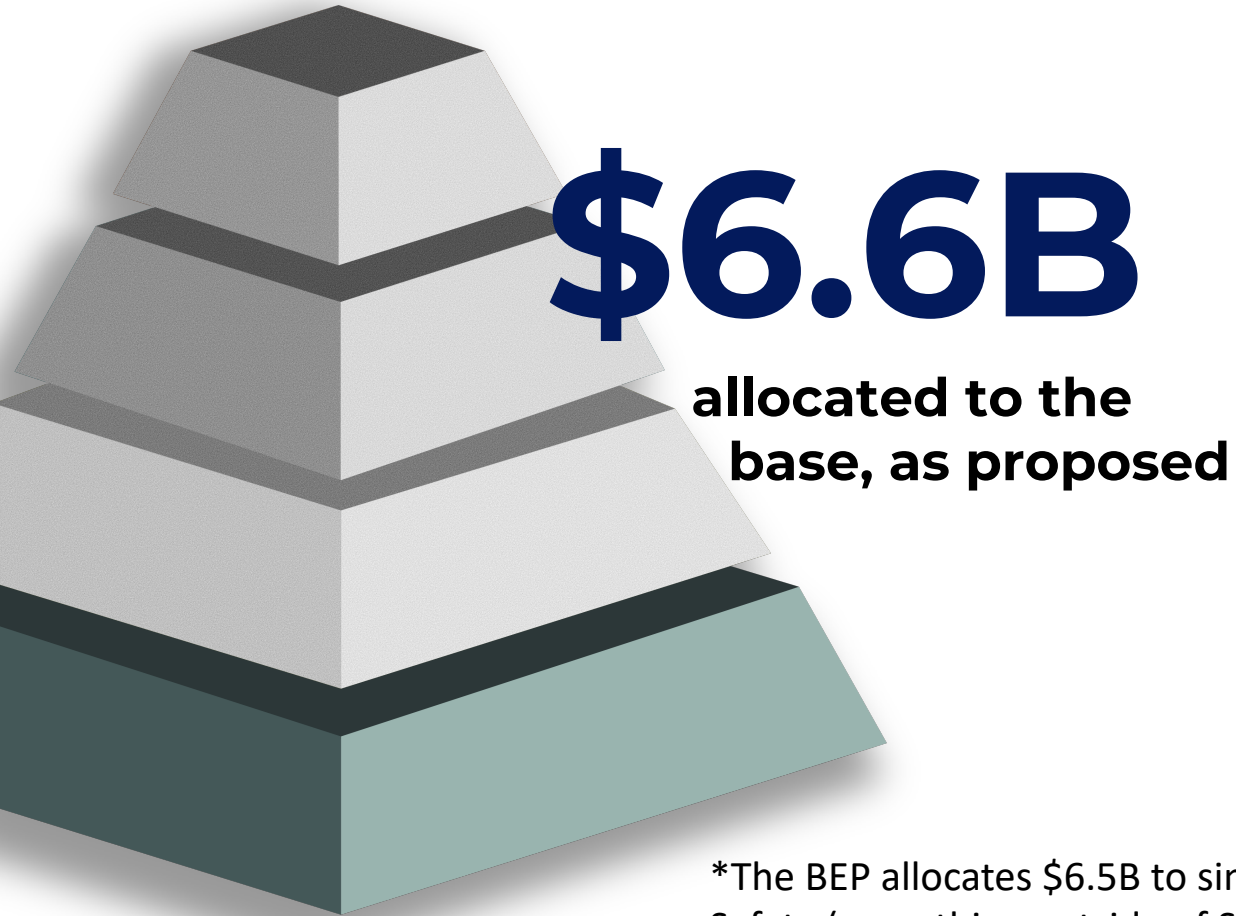
in new recurring state funds  
(\$250M FY23 and \$750M FY24)

**\$750M** 

in one-time state funds  
in FY23



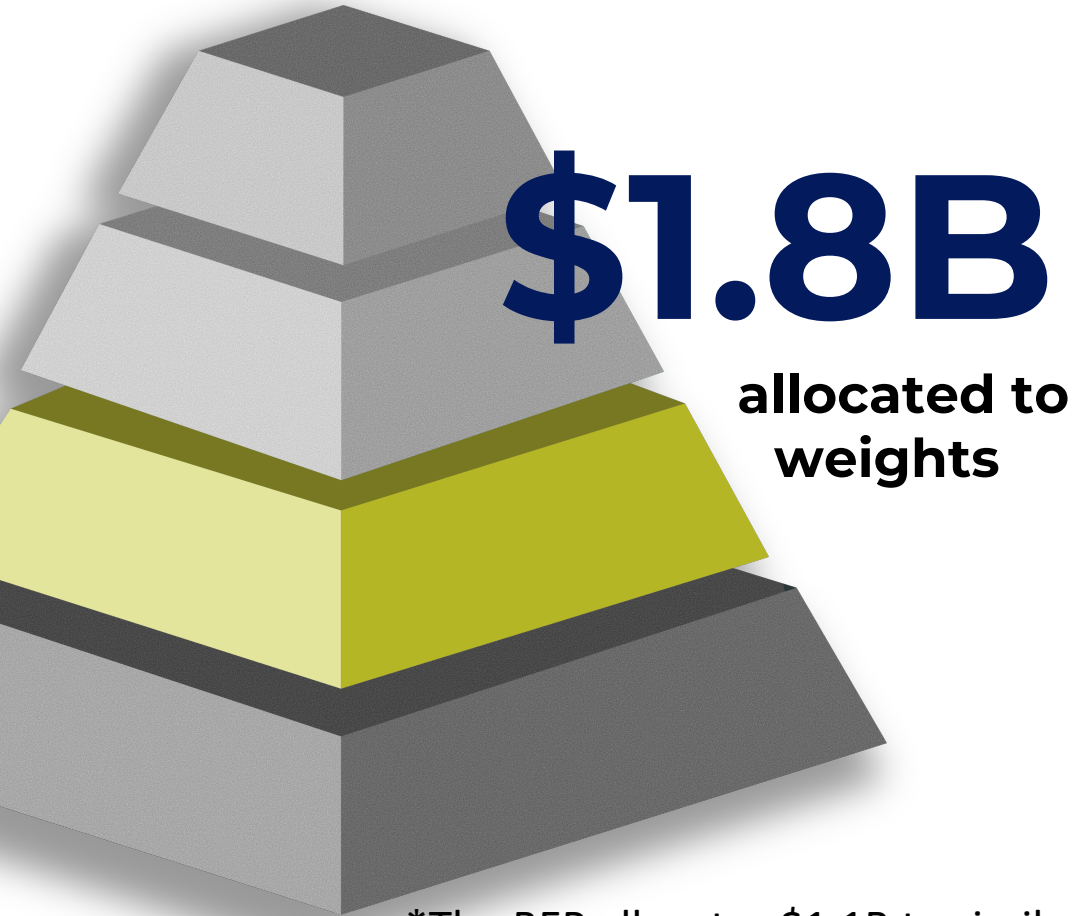
# Overview: Base Funding



- Existing funding was **maintained and strengthened**
- **Additional funding available for teacher salaries, nurses, counselors, principals, RTI2, technology**
- **Funds school support staff so teachers are** empowered to concentrate more on academic instruction
- **Empowers Tennessee to recruit** out-of-state teachers and grow the in-state teacher workforce

\*The BEP allocates \$6.5B to similar categories including CSH, FRCs and Safety (everything outside of SPED, EL, "At Risk," CTE, and ACT)

# Overview: Weight Funding



**Economically Disadvantaged and  
Concentration of Poverty**

**Sparse and Small**

**Unique learning needs, including:**

- Students with disabilities and gifted students, English learners, and students with characteristics of dyslexia
- Students with multiple learning needs can receive additional funding for each need

**Charter school facilities**

\*The BEP allocates \$1.1B to similar categories (SPED, EL, and “At Risk”)

# Breaking it Down: Weights

**TISA would provide funds for the \$6,860 BASE plus:**

Economically disadvantaged students



**Base x 25%**



**322,073 students**

Students living in areas of concentrated poverty



**Base x 5%**



**652,039 students**

Students in sparsely populated communities  
and students in small school districts



**Base x 5%**



**326,549 students**

Students with unique learning needs



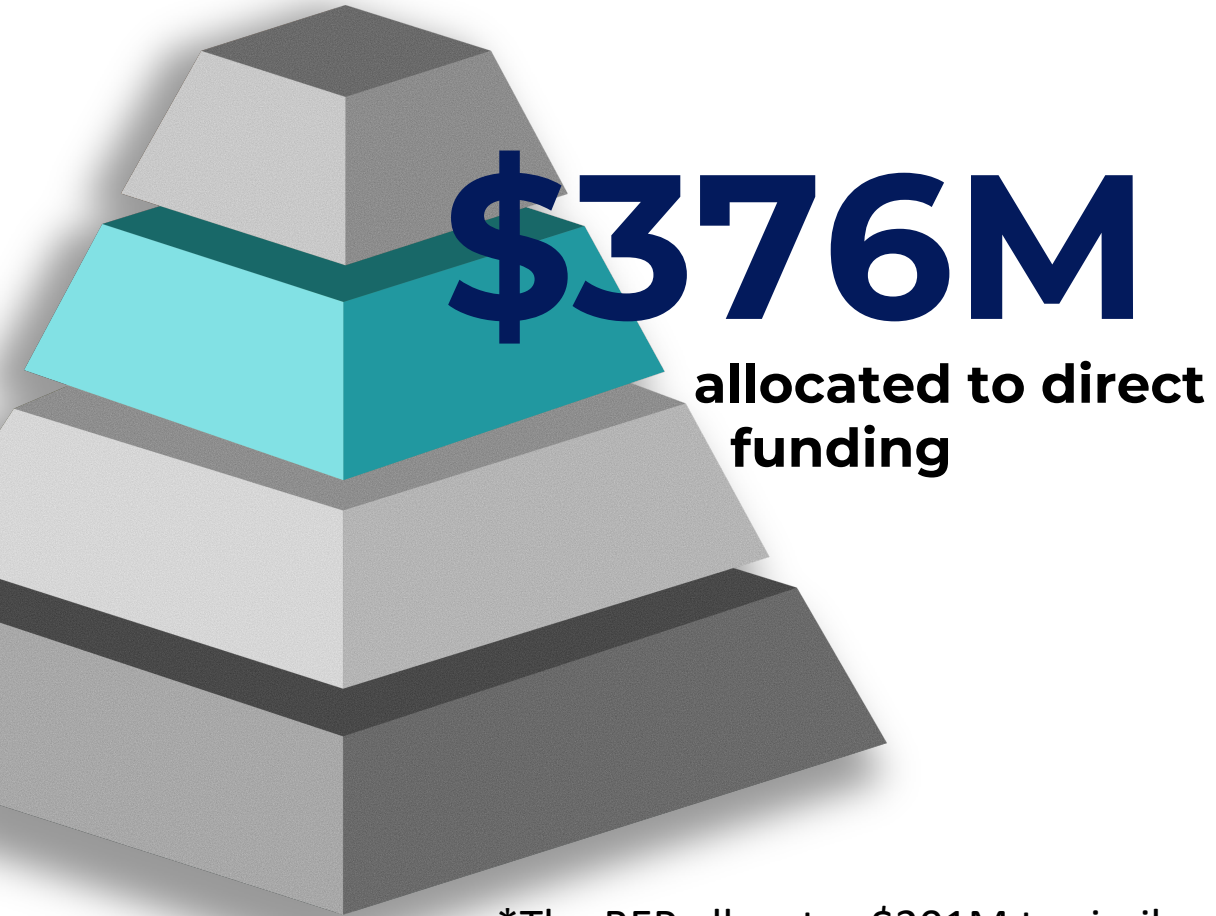
**Base x ULN %  
Range: 15% - 150%**



**288,072 services  
(students may generate  
up to 4 services)**



# Overview: Direct Funding



**Supports programs that offer students** learning opportunities beyond everyday classroom instruction

**\$145 million to enhance K-3<sup>rd</sup> grade literacy**

**\$8 million to offer literacy tutoring** to 4<sup>th</sup> graders who need more support

**\$210+ million to support career and technical education**

**\$13 million to fund post-secondary assessments** (ACT and ACT Retake)

\*The BEP allocates \$201M to similar categories (CTE and ACT)

# Breaking it Down: Direct Funding

**TISA would provide districts additional funds to:**

Enhance literacy supports for K-3 students



**\$500 per K-3 student**



**288,862 students**

Offer literacy tutoring to students who need more help



**\$500 per student**



**15,737 students**

Strengthen and expand high-value career and technical education offerings



**\$5,000 avg. per student**



**42,064 students**

Pay for two administrations of a post-secondary assessment



**\$185 per student**



**69,894 students**

# Outcomes

Category		Outcome	Dollar Amount	Percent of Students
Literacy	Not Economically Disadvantaged	Base x 20%	\$1,372	45.9
	Economically Disadvantaged	Base x 40%	\$2,744	21.73
ACT Score of 21 <sup>1</sup> or Industry Credentials	Not Economically Disadvantaged	Base x 20%	\$1,372	34.77
	Economically Disadvantaged	Base x 40%	\$2,744	6.93
Post High School	All Students	Base x 5%	\$343	42