

December 2025

Equalizing Opportunity: Creating a Fair and Transparent Funding System for Rhode Island's Public Schools

Full Report

Recommendations of the Blue Ribbon Commission

Prepared by The Annenberg Institute at Brown University

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About The Blue Ribbon Commission

The Blue Ribbon Commission (Commission) was established in December 2024 to examine and recommend changes to the Rhode Island education funding system to inform legislative action toward fair, equitable, and adequate school funding.

The Commission was co-chaired by David N. Cicilline, President and CEO of the Rhode Island Foundation, and Nora E. Gordon, Distinguished Professor of Public Policy at Georgetown University's McCourt School of Public Policy.

The members of the Commission represented a range of stakeholders and brought key perspectives to the Commission’s work. Commission members included:

Rania Aghia, Rhode Island Teachers of English Language Learners

Mary K. Barden, National Education Association Rhode Island

Marcela Betancur, Latino Policy Institute

Maribeth Calabro, Rhode Island Federation of Teachers and Health Professionals

Peter Chung, Young Voices

Chiara Deltito-Sharrott, Rhode Island League of Charter Public Schools

Michael DiBiase, Rhode Island Public Expenditure Council

Timothy C. Duffy, Rhode Island Association of School Committees

Michael D. Hassell, Rhode Island Association of School Principals

Lisa A. Hildebrand, Rhode Island Association for the Education of Young Children

John Kelly, Meeting Street

Weayonnoh Nelson-Davies, The Economic Progress Institute

Jeannine Nota-Masse, Rhode Island School Superintendents Association

Paige Parks, Rhode Island KIDS COUNT

Randy R. Rossi, Rhode Island League of Cities and Towns

Ramona Santos Torres, Parents Leading for Educational Equity

The Annenberg Institute at Brown University served as a research partner and facilitated the Commission. The Annenberg Institute team included:

John Papay, Director of the Annenberg Institute and Walter and Lenore Annenberg Associate Professor of Education Policy

Brenda Santos, Director of Rhode Island Research Partnerships and Networks

Bila Djamaoeddin, Research Project Manager

Kirk Murrell, Project Director

The Commission met eight times from Winter 2024 through Fall 2025. In many of these meetings, the Commission heard from national, regional, or state experts on a range of topics related to school funding and discussed the implications of these presentations for the State of Rhode Island. The Commission also met to formulate recommendations, discuss tensions that arose, and align on a final set of proposals. Commission members had structured opportunities to offer their own expertise to the group.

Peter Chung from Young Voices along with Bila Djamaoeddin and Brenda Santos from the Annenberg Institute also facilitated a Youth Working Group. This Working Group provided the Commission with an on-the-ground perspective of how the state education funding system affects students. The fourteen Youth Working Group members represented eight school districts including traditional public school districts and charter schools in urban, suburban, and rural communities across the state. The Youth Working Group shared the following priorities in their report to the Commission:

- Both a required local contribution and transparency about district spending are necessary to adequately and effectively fund schools.
- Special education funding should be an essential aspect of the funding system going forward, as it ensures equitable treatment and support for all students.
- Funding for transportation to and from schools is essential. It is a universal burden that, if lifted, would improve the lives of every student in Rhode Island.
- Funding should support students’ needs. Funding for school social workers and improving funding for multilingual learners will help uplift and support all students, particularly those who need these services the most.

The Annenberg Institute interviewed more than 45 local stakeholders and national experts. The Annenberg Institute also convened an Accountability Working Group focused on the role of state accountability and the state education funding system. The Accountability Working Group consisted of four national experts with deep and diverse expertise on this topic:

Linda Darling-Hammond, Charles E. Ducommun Professor of Education Emeritus at Stanford University and Founder of the Learning Policy Institute and Chair of the California State Board of Education

Ila Deshmukh Towery, Partner at Education First

Michael J. Petrilli, President of the Thomas B. Fordham Institute

Paul Reville, Francis Keppel Professor of Practice of Educational Policy and Administration at the Harvard Graduate School of Education and former Secretary of Education in Massachusetts

A Letter from the Blue Ribbon Commission Co-Chairs



On behalf of the Blue Ribbon Commission, with expert guidance, research, and facilitation provided by the Annenberg Institute at Brown University, we are pleased to share “Equalizing Opportunity: Creating a Fair and Transparent Funding System for Rhode Island’s Public Schools” with you.

Over the past year, the Commission, comprised of local education leaders and trusted community partners, has worked diligently to develop a set of recommendations for a fair, equitable, and adequate school funding system—one that will contribute to the wellbeing of Rhode Island’s children and families and to the long-term prosperity of our state.

We recognize and are grateful for the work of policy-makers, advocates, and education leaders who laid the foundation for Rhode Island’s current education funding system. The original formula, enacted 15 years ago, was a significant step forward—and efforts to improve it have continued since. We are at a point now, however, where there is recognition that the current system is no longer sufficient, is inequitable, and needs to be modernized.

We have taken a holistic look at the existing funding formula and developed a forward-looking vision for what a modern, student-centered funding system can and should accomplish. One that reflects changes in our economy and enrollment patterns, is resilient to political shifts that create unpredictability, and embodies the values of Rhode Islanders.

Our recommendations are grounded in seven guiding principles: sufficiency, student-centeredness, comprehensiveness, predictability, transparency, equity in fiscal burden, and accountability.

This process included nine full Commission meetings, testimony from twelve subject-matter experts, and the work of two dedicated groups: a Youth Working Group made up of 14 students from 8 districts, and an Accountability Working Group composed of national experts. Additionally, 45 interviews were conducted with local stakeholders and national leaders.

The Youth Working Group played a critically important role in shaping the recommendations, offering invaluable

insights into how funding decisions directly affect students’ daily experiences. The Accountability Working Group provided expert guidance on the accountability components of our recommendations, emphasizing the importance of transparency and strategic management that links spending decisions to educational outcomes.

We propose a more comprehensive and transparent approach to funding education in Rhode Island. Our recommendations incorporate nearly all costs associated with educating a student—many of which currently fall outside the formula, such as school building maintenance and transportation. By including these costs, the proposed funding system better reflects the true cost of education and allows for more precise tailoring of resources to student needs through enhanced weights. The proposal also calls for a more equitable sharing of responsibility between state and local governments, and includes measures to strengthen accountability and transparency for taxpayers, students, families, municipal leaders, and the state.

This report represents the consensus vision of the Commission members. We believe the recommendations within it will ensure that Rhode Island’s school funding system lifts all communities and supports all learners.

We are proud to share this work with teachers, parents, students, education leaders, and policymakers—and we look forward to engaging with you on these recommendations. Our students deserve a funding system that reflects our shared commitment to their future. The time to act is now.

Sincerely,

David N. Cicilline

President & CEO, Rhode Island Foundation
Co-Chair, Blue Ribbon Commission

Dr. Nora E. Gordon

Distinguished Professor of Public Policy,
Georgetown University’s McCourt School of Public Policy
Co-Chair, Blue Ribbon Commission

02

Introduction
and Overview**Investing in a robust and effective public education system is critical to ensuring that Rhode Island's children flourish and that our state's economy prospers.**

education and the job market. It expands beyond proficiency in mathematics and English language arts to include rich instruction in science, history, technology, and the arts. It rests on a highly trained and effective educator workforce, with well-prepared educators across

We believe that access to a high-quality public education should be a fundamental experience for all people in our state. Indeed, it is foundational for our state's ability to succeed in an increasingly flexible and interdependent world economy.

Investing in schools pays off. The best and most recent evidence suggests that each additional dollar devoted to public education produces more than two times as much in future earningsⁱ. States that have invested in education have seen outsized gains. Massachusetts, for example, invested billions of dollars in public education as part of its sweeping Education Reform Act of 1993, and, in the decades since, average educational attainment in the state has significantly increased for students overall and for key groups like multilingual learners and low-income studentsⁱⁱ. And, we have seen at home—time and again—the challenges of underinvesting in our system, as employers leave the state in search of a better skilled workforce.

In short, our collective success as a state, including a vibrant and growing economy, rests in large part on our ability to develop a world-class public education system. We have not fully unlocked our state's potential—and the potential of our state's youth. Recently, state leaders have elevated education in their public discourse, calling for Rhode Island to match Massachusetts—by many measures the highest performing school system in the United States—by 2030. This is a critical part of the state's strategy to substantially improve the per-capita income of Rhode Islanders. And, it is what our students and families deserve.

Achieving these goals, however, will require Rhode Island to do things differently. A world-class education system provides rich and engaging learning experiences for all students. It attends both to students' academic learning and to their socioemotional development, building the types of 21st century skills—like critical thinking, collaboration, and communication—that are critical to their future success. It focuses on relevant educational experiences that engage students and prepare them for post-secondary

subject areas. And, it provides a wide range of supports for students—from academic to behavioral to mental health—to ensure that they thrive in school.

The state has made progress in recent years, with the state legislature passing two landmark bills that ensure all students in the state have access to high-quality curriculum materials in core subjects and evidence-based reading instruction. However, the state has consistently landed in the middle of the pack in national rankings. On the 2024 National Assessment of Educational Progress, Rhode Island 8th graders were ranked 29th by state in mathematics and 21st in reading. The state had not placed higher than 16th nationally in 4th or 8th grade mathematics or reading in the two decades prior to the most recent assessment*.

Making sustained and dramatic progress requires not only connected and coherent policies that support schools but also resources that enable educators to meet these goals. Here, our current system is not functioning well. It embeds inequity in school funding—Woonsocket and Pawtucket, two districts with substantial instructional needs, spend less money per pupil than the average district. It also is inefficient and unstable, making communities across the state face last minute budget challenges without fully understanding why state aid is changing. It places significant burdens on local districts—if a few students with high-cost needs for special education services enroll, the district must bear hundreds of thousands of dollars in additional costs without shifts in aid. And, it does not connect education funding to student outcomes so that taxpayers know that dollars are being used efficiently to support learning.

Over the past year, the Blue Ribbon Commission has taken up the challenge of how to structure an education funding system that will provide sufficient and equitably distributed resources to meet the state's 21st century educational goals. The Commission—made up of key stakeholders from across the state—has examined in detail the existing

^{*}RI ranked 14th in 4th grade math in 2024

system. We have surfaced aspects of the current system that are working well and those that are creating challenges for school districts* across the state. To ground our work, we defined a set of consensus principles that we believe should be central to any revisions to education funding in

the state. Most critically, we provide a set of recommendations that we believe will dramatically improve educational funding across the state so that Rhode Island schools can provide a world-class education.



**We use the term "school districts" to refer to all local education agencies: traditional public school districts, charter schools, and state-operated schools.*

There is clear urgency and momentum to improve educational outcomes for students. Four important trends make revisiting education funding more important than ever:



Uncertainty in the federal funding landscape.

The past five years have seen dramatic shifts in federal funding for education—from an influx of short-term pandemic recovery dollars to an uncertain federal budget. Rhode Island needs a comprehensive and coherent system that can provide school districts more stability, not more unpredictability.



Increasing inequality and segregation.

Across the country, growing income inequality and residential segregation have created larger gaps than ever between the “haves” and “have nots.” In a state this small, inequality across the state affects all of us. Any education funding efforts should work to raise all boats and improve outcomes for all students.



Declining enrollments.

Rhode Island’s public school enrollments have been falling for more than a decade. While this shift was accelerated by the pandemic, it reflects broader demographic trends. Most school districts are losing students. While the Commission does not recommend consolidation per se, we note that if the state were a single district, it would only be the 18th largest school district in the country. With just over 130,000 public school students in 36 traditional public school districts and almost 30 charter and state-operated schools, the state needs to think carefully about how to support all students efficiently while preserving community voice and local autonomy.



Changing economy.

Automation and the internet have reshaped the economy over the past thirty years. Artificial intelligence and new technological advances promise to do the same in the next decade. It is likely that education – and particularly the types of career and 21st century skills needed for the new economy – will pay off even more in the future than it has in the past. Ensuring that Rhode Island’s students of today can thrive in the economy of tomorrow is a key challenge that state policymakers must address. This challenge affects not only current students but our state as a whole—when employers leave the state because they cannot find skilled young workers, other jobs leave, and the state’s economy suffers.

The Commission enthusiastically supports the state’s ambitions to make Rhode Island one of the nation’s top education systems. Building a world-class education system is not just a talking point, it is good public policy and what our students and families deserve. Creating a fair, equitable, transparent, and efficient education funding system is a critical piece of the puzzle.

03

The Current Rhode Island Funding Formula

The current funding formula was enacted in 2010, first implemented in 2012, and adjusted by the General Assembly in 2016. It is grounded in principles that the Commission continues to see as critical. Then and now, the Rhode Island funding formula aims to distribute funds to school districts equitably, ensure predictability and consistency of funding from year to year, and embody the principle that the “money follows the student” so that students are fairly funded regardless of the school they attend. In this section, we provide an overview of the current Rhode Island funding formula.

The central function of the current funding formula is to determine the cost of educating Rhode Island students and the share of that cost that will be paid by the state.

The current funding formula defines the cost of education narrowly. It begins with a “Core Instruction Amount” (CIA) that is based on a regional average (from Connecticut, Massachusetts, Rhode Island, and New Hampshire) of instructional expenditures. This includes things like teacher salaries and classroom materials, but not things like building maintenance or transportation. To account for the higher cost of educating special student populations, two adjustments are used—a “Student Success Factor” to support economically disadvantaged students (40%) and a “Multilingual Learner Factor” (20%) to support English language learners.

To determine what share of the CIA the state will pay to a school district (or “state formula aid”), the current funding formula takes into account local property wealth and the concentration of child poverty in the municipality. At a high level, Figure 1 illustrates how state formula aid is currently calculated for each school district.

It is the responsibility of each municipality to close the gap between the state share and the cost of educating local students, but this is not required under the current funding formula. Whether a student attends school within their traditional public school district, goes to a charter school, or has an interdistrict placement, the municipality where each student lives contributes the local share. It is important to note that, depending upon local property wealth and concentration of child poverty, the portions paid by local and state sources differ from community to community. For example, this means that districts that educate large populations of economically disadvantaged students are going to have a higher cost of educating students.

Figure 2 illustrates this idea. The current funding formula is the mechanism that determines the cost of educating students, or the size of the “bucket,” as well as how much of the funding toward those costs comes from the state versus local municipalities.

Figure 1: State Formula Aid Calculation

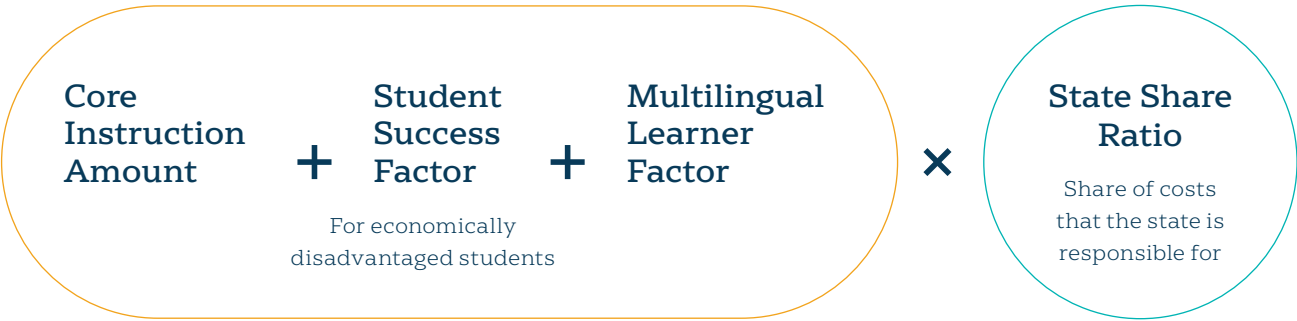
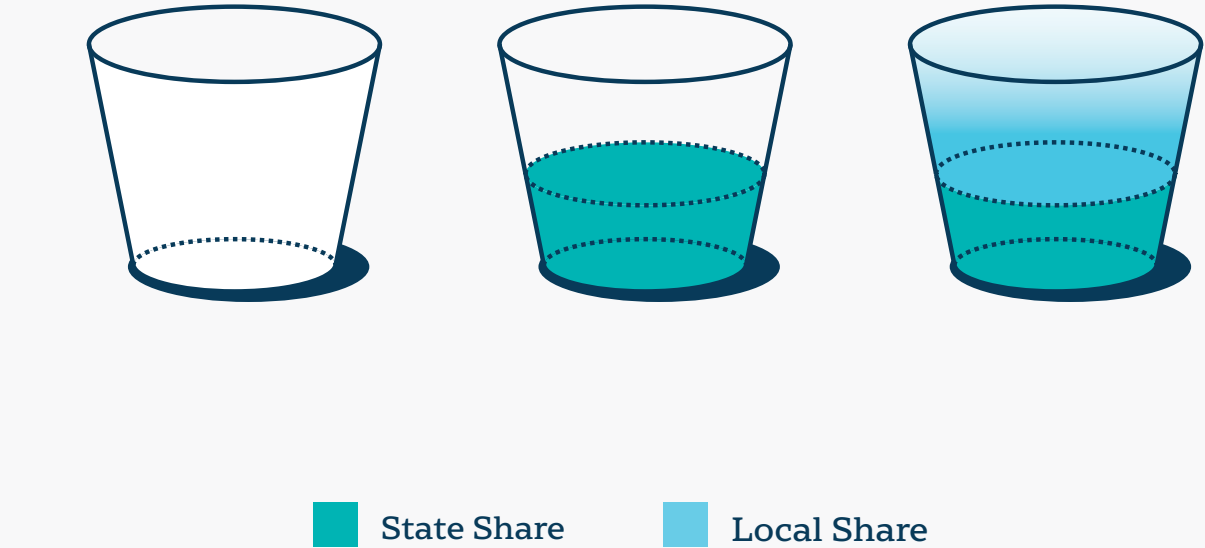


Figure 2: State and Local Shares



State formula aid makes up the lion's share of the state's spending on education. In Fiscal Year (FY) 2026, state formula aid accounted for over two-thirds (77%) of state education funding to districts. The rest was distributed through categorical funds. As of FY 2026, districts have access to the following categorical funds:

- **High-Cost Special Education** – funds to serve students with extraordinary special needs
- **Early Childhood Education** – funds to serve RI Pre-K students
- **Career and Technical Education (CTE)** – funds to support the establishment of new CTE programs
- **Student Transportation** – funds to transport students to out-of-district non-public schools

Categorical funds are approved annually through the state's budgeting process without reliance on clear formulas, so their level of funding can change from year to year. Categorical funds come with more restrictions than state formula aid, and they are vulnerable to state budget constraints. It is typical for districts to be partially, rather than fully, reimbursed for the costs targeted by categorical funds.

The next section outlines the Commission's conclusions about the strengths and weaknesses of the current funding formula, and dives deeper into how the overall education funding system functions.

04

What Is Working and What Is Not

The introduction of the current education funding system in 2010 improved the provision and delivery of funds to school districts across the state. While key aspects of the current funding system require revision, many aspects are working well. The Commission believes that we can build on the strong foundation of the current system, carrying over the portions that work best while addressing critical challenges.

What Is Working

Funding Stability

Prior to the current funding formula, state funding for education was volatile and subject to political influence. The introduction of a formula created a depersonalized, annual calculation for distributing funds, reducing uncertainty for school districts. In addition, policies have been put in place to protect school districts from the impact of declining student enrollments.

Established Target for Per-Pupil Spending

The formula establishes a clear target amount for per-pupil spending, encouraging more equitable spending for students across the state. Using average regional spending to calculate the CIA ensures that education spending in Rhode Island is in line with regional costs.

Funds for Students and Communities with the Highest Need

The formula allocates state funds through a weighted-student formula that directs more money to students with greater instructional needs. The state's per-pupil weights of 40% for economically disadvantaged students and 20% for multilingual learners (MLLs) are relatively generous compared to other states and are additive, meaning that students qualifying for both weights receive the full combined weight of 60%. The formula also prioritizes communities with fewer resources. Indeed, between FY 2012 and FY 2021, nearly 60% of new state education funds went to the state's urban core districtsⁱⁱⁱ.

Increased State Investment in Education

Since the formula's implementation in 2012, both the share of the state's budget devoted to education and the state's share of total spending on education in Rhode Island have increased. For example, in FY 2023, state revenue made up roughly 40% of spending on education, up from 32% in FY 2012ⁱⁱⁱ.

State Support for High-Cost Services

Categorical funds for high-cost special education have provided some financial relief for school districts to manage the cost of educating students with extraordinary special needs. Similarly, categorical funds for CTE have helped to defray start-up costs associated with new CTE programs, allowing for a large and varied landscape for CTE programming in the state.

What Is Not Working

Complex and Opaque

The calculations used to determine the amount of state aid that school districts receive are complicated and confusing. For example, Rhode Island is the only state that utilizes a quadratic mean to calculate the state's share. Changes to the formula introduced over time, like hold harmless provisions, have further complicated the formula and made it less transparent. This complexity causes several challenges. First, few stakeholders fully understand the formula and its calculations. Second, it leads stakeholders to question changes in state aid from year to year. Districts that lose state aid often wonder if those decisions are fair because the calculations are opaque. Third, it means that state legislators have limited scope to change total investments in education without adjusting components of the formula itself.

Excludes Important Educational Costs

The CIA in the current formula focuses only on narrowly defined instructional costs. It does not include several important costs such as transportation, building maintenance, and retiree pension and healthcare costs. These costs are critical for educating students, and districts must bear them using funds that were allocated for other instructional purposes. Critically, these costs make up a quarter of education spending statewide^{iv}. While the state offers limited reimbursement for some of these costs, most must be paid for by local revenues.

Not Inclusive of Required Early Childhood Education Costs

A particularly important cost not included in the current formula relates to early childhood education. Some early childhood costs—including RI Pre-K—are subsidized by state funds. But, by federal law, all children ages 3-5 must receive a developmental screening and must receive special education services if identified. Currently, the costs for these services fall mostly on local districts, placing undue costs on districts and leading students to not get the services they require.

Not Inclusive of Costs Associated with All High-Need Student Populations

The formula does not provide additional funding for students with disabilities or for MLLs that have met the state's exit criteria. This exclusion from additional state funding conflicts directly with federal service provision requirements for these students. To pay these costs, districts have to cross-subsidize with funds that would have been used to support general education. For example, the state's categorical fund for high-cost special education only reimburses costs that exceed 4 times the average per-pupil expenditure level, meaning that districts are responsible for all costs—both for these high-cost students and other students with disabilities – below this level.

Not Reflective of the Range of Programs in Which Rhode Island Students Are Enrolled

Rhode Island students attend traditional public schools, charter schools, CTE programs in neighboring public schools, and special programs tailored to their needs. The current system for determining how state and local funds will support these students is complex, burdensome, and inequitable in several ways. Districts get different funding depending on which district students come from, and some dollars do not actually follow the students. The lack of predictability and transparency in the current formula is, in part, a product of other funding inequities (related to special education, for example). It harms both the districts that send students out of district, and the districts that receive them.

No Required Local Contribution for Municipalities

Rhode Island is one of only three states that grant aid to school districts without requiring some minimum local contribution towards school spending. Maintenance of effort (MOE) provisions ensure that municipalities commit to the same level of total local funding as in past years. But this means that districts with very low local contributions are only required to maintain them. MOE does not require municipalities to keep pace with increased costs. In fact, MOE likely discourages local communities from

increasing their levels of school funding because any new spending will need to continue in the future. While educational expenditures, state contributions to education, and property values have increased across the state in recent years, local contributions to some school districts have not, contributing to severe inequities in spending across the state.

Inflexible to Sudden Changes in Districts' Needs

The formula allocates aid once a year and does not provide any form of insurance for districts that face sudden changes in enrollment during the year. For example, costs for out-of-district special education placements and transportation for homeless and foster care students can fluctuate substantially based on sudden shifts in student populations. Shifts like these often result in considerable and unexpected costs to the district. Moreover, categorical funds for some of these costs come as reimbursements during the following school year, putting strain on school budgets.

Unpredictable

The timing of the state's budget approval does not align with the timing of districts' budgeting process. Districts are forced to set budgets and make monetary decisions without knowing the exact amount of funding they will receive from the state. Ad hoc categorical funds for some services compound this challenge. Meanwhile, holdback policies that reduce funding sent from traditional public school districts to charter schools also make it difficult for some schools to predict budget levels from year to year.



05

Guiding Principles



The advantages and limitations of the current funding formula inform the Blue Ribbon Commission's recommendations. We ground these recommendations in a set of key principles for an improved and innovative education funding system for students in the state. We identify seven such principles:

- 01 Sufficient**
State and municipal governments should contribute sufficiently to fund effective systems of education for all students.
- 02 Student-Centered**
Dollars should follow students in ways that are fair and equitable, taking into account the costs of different instructional needs. Funding should increase when enrollment rises and decrease when it falls.
- 03 Comprehensive**
The state education funding system should include consideration of additional costs that districts must bear and to which some districts face particular exposure (e.g., special education, Pre-K, transportation, legislative mandates, pension obligations, etc.).
- 04 Predictable Yet Flexible**
The state education funding system should be both predictable for school districts and municipalities and sufficiently flexible to respond to unforeseeable needs related to student demographics, enrollment shocks, or external fiscal circumstances that arise. In particular, risk for additional costs that fluctuate substantially from year to year should be shifted to the state to ensure equity and predictability.
- 05 Transparent, Accurate, and Timely**
The state education funding system should be transparent and clear, so each school district readily knows what it will receive. Data that informs the basis of the funding system should be accurate and timely.
- 06 Equitable Fiscal Burden**
Municipalities should contribute resources to their local schools in proportion to their ability to generate revenue and should receive state funds in a timely manner.
- 07 Accountable**
Districts that receive state funding should be held accountable for efficient and effective uses of dollars that produce results for all students aligned with state goals. They should also be accountable to municipalities and taxpayers. The state education funding system should ensure sufficient and accessible data to track spending while guarding against administrative burden.

06

Rhode Island's Education Funding System Recommendations: A Framework

Aligned with our proposed core principles, the Commission recommends four primary shifts in how education funding works in the state.

01

Account for the full cost of education in the funding system and share those costs more equitably.

02

Tailor educational costs per student more directly.

03

Require local contributions in line with a municipality's ability to pay.

04

Increase fiscal responsibility, reporting, and strategic management.

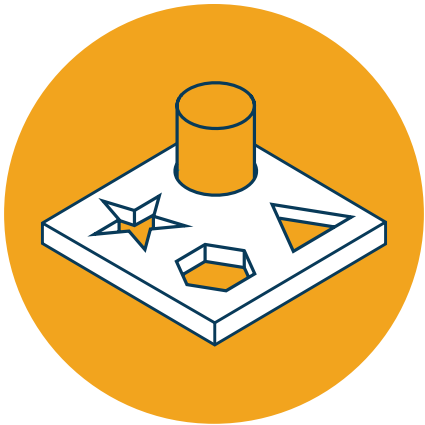
Four Primary Shifts



01

Account for the full cost of education in the funding system and share those costs more equitably.

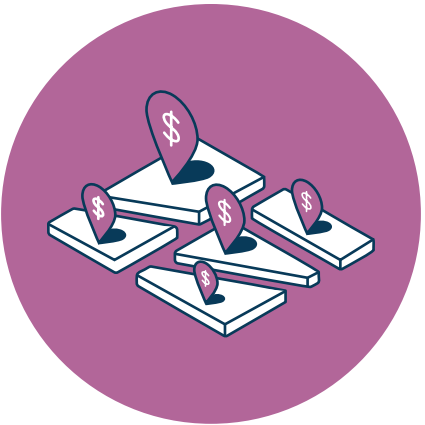
Education costs are shared by the state and municipal governments*. At its most basic level, the Rhode Island education funding system should determine which costs are shared and what portion of those costs each level of government pays. The Commission proposes that nearly all expenditures related to serving current Rhode Island public school students should be accounted for in the funding system and shared costs by the state and municipalities. This will help make spending on education more transparent, clear, and equitable across the state.



02

Tailor educational costs per student more directly.

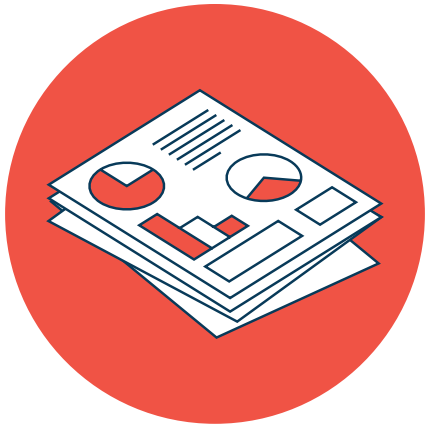
Rhode Island should refine its funding system to ensure that dollars follow students according to instructional needs. Specifically, this means that the system should account for differential educational costs in a transparent and equitable way. In practice, the Commission recommends using additional student weights to identify districts’ educational costs, as nearly all states across the country already do*. It should also ensure that dollars follow students when they cross district lines.



03

Require local contributions in line with a municipality’s ability to pay.

Each municipality is responsible for supporting the public education costs of students living in that city or town, regardless of whether the student attends an in-district school, an out-of-district placement, or a charter school. Municipalities should contribute to these costs in proportion to their ability to raise revenue via property taxes. This minimum local contribution should be required to receive state aid. Municipalities should be free to support local public education more generously if they desire.



04

Increase fiscal responsibility, reporting, and strategic management.

Reaping the benefits of an improved and more equitable education funding system requires that funds are spent efficiently and effectively to promote the state’s educational goals. The education funding system should include increased requirements around fiscal responsibility, reporting, and strategic management. These requirements should promote more robust planning and strategic management from districts that tie spending to educational outcomes, ensure transparency, and provide tiered support and capacity-building to ensure that goals are being met.

**While the federal government contributes some supplemental funds to schools, they represent a relatively small share and legally, states must allocate funds without federal funding in mind.*



01
Account for the full cost of education in the funding system and share those costs more equitably.

The state education funding system needs to be clear about the level of funding that districts receive each year, at a minimum, to support public education and describe what portion of this funding comes from the municipality and what portion from the state.

The current funding formula excludes many costs. For example, currently districts alone must pay for services like transportation, building maintenance, and early childhood special education. The Commission recommends that nearly all expenditures associated with serving current public school students should be accounted for within the funding system. This will help make public education expenditures more transparent, clear, and equitable across the state.

Figure 1 shows the existing system and the Commission’s proposed system. In the existing system, some educational costs are borne by the state, others are accounted for in the funding formula as shared costs, and others are borne by municipalities directly. In addition, there are shared costs—

Figure 1:
Existing and Proposed System for Allocating Educational Expenditures Across State and Local Sources

	Existing System	Proposed System
State-Funded Costs <i>(state covers costs entirely)</i>	<ul style="list-style-type: none">• High-cost special education >4x average per-pupil• Other categorical costs*	<ul style="list-style-type: none">• All special education services for high-cost students• Legacy teacher pension debt• Out-of-district transportation• Early childhood screening• Other categorical costs*
Funding Formula <i>(state & local share the cost)</i>	<ul style="list-style-type: none">• Instructional costs <p>Other Shared Costs:</p> <ul style="list-style-type: none">• Teacher retirement costs• Out-of-district transportation	<p>Expanded educational costs, including:</p> <ul style="list-style-type: none">• In-district transportation• CTE costs• Building maintenance• Early childhood special education services• Retirement costs for <i>current</i> teachers• Sports and student activities
Locally-Funded Costs <i>(outside of formula)</i>	<ul style="list-style-type: none">• In-district transportation• CTE costs• Building maintenance• Early childhood screening• Special education services• Other locally-determined expenditures**	Other locally-determined expenditures**

*The state should continue to support specific expenditures it deems important, such as teacher professional development or creation of CTE programs.
**Local districts should continue to support specific services they want to provide above and beyond instructional costs.

such as teacher pensions—outside the funding formula, and these arrangements are often complex. The proposed system will clarify the total amount of educational expenditures supported by the system and include more of these expenditures as shared costs.

The Commission believes that clarifying the shared nature of costs can lead to potential efficiencies and cost savings over time.

To achieve this goal, the Commission recommends two major shifts. First, to ensure that funding is appropriately comprehensive, the CIA should be expanded to include a regional average of current educational expenditures per student (not just current instructional expenditures, as in the existing formula). This expanded amount, which we refer to as the Core Education Amount (CEA) in this report, includes costs such as transportation, building maintenance, early childhood education services, and food service that are directly related to student learning and not included in the current Core Instruction Amount.

For more information, see page 49:
Core Education Amount

The Commission recommends that only a few categories of expenses fall outside of this CEA and that the state should take on fiscal responsibility for the following costs:

- **High-cost special education** is currently defined as costs for special education services that exceed four times the per-pupil expenditure for an individual student. Such services for students with severe disabilities are often provided in out-of-district placements. Most districts serve few such students, but these costs are unpredictable and can be overwhelming for districts. There are clear opportunities for consolidation and increased bargaining power by aggregating these costs at the state level. The Commission proposes that the state cover the full cost of educating these students.
- For more information, see page 49:
High-Cost Special Education
- **Statewide transit** transports students who are participating in statewide programs between districts. These costs are borne inequitably and inefficiently by districts. By funding it at the

state level, the state can eliminate a large and unexpected cost to districts and enable greater cost efficiency. Doing so would bring Rhode Island in line with other states around the country^{vi}.

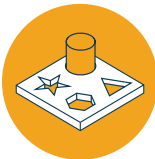
For more information, see page 49:
Transportation

- **Early childhood screening** is a federal requirement and school districts are not well-positioned to accomplish this task. Having districts do the screening and pay for the costs of services that the screening identifies may also create potential adverse incentives that could lead districts to limit identification. Screening is another place where a state-funded system could provide substantial efficiencies and improve services for children. The Commission proposes shifting primary responsibility for screening to the state. The state would create a system to ensure universal screening and fund that system.

For more information, see page 50:
Early Childhood Screening

- **Legacy teacher pension liability** is the cost of paying teachers who have retired from Rhode Island public schools. While the state is moving toward a fully funded pension system, past actuarial calculations have resulted in unfunded liabilities for retired teachers. The Commission recommends that the state be fully responsible for the pension costs for retirees (not current teachers and not future retirees) as 15 other states have already done^{vii}. As legacy pension debt for retired teachers is paid down, state actuaries project the state’s total contribution will decline significantly by 2036.

For more information, see page 50:
Teacher Pensions



02
Tailor Instructional
Costs per Student
More Directly

As described above, the Commission proposes using the regional average of current educational expenditure per student to define the CEA. Thus, the CEA represents the average cost of educating all students in the region, including those who require additional funding for special services or programs. But, as in the current funding formula, districts have different instructional needs (and associated costs) depending on the students that they serve.

As a result, the proposed education funding system must include adjustments to the CEA to account for these differences. Building on the current formula, the Commission proposes to refine the existing factors for economically disadvantaged students and MLLs and to include new factors for students with disabilities and those in high-cost CTE programs.

First, the Commission continues to recommend a Student Success Factor (SSF) recognizing that students who come from economically disadvantaged households may have a range of additional academic and socioemotional needs that incur additional costs for school districts. The Commission recommends increasing the SSF factor from 40% to 50% of the CEA. It further recommends that the state use administrative data to more accurately identify economically disadvantaged students rather than relying on incomplete data and adjustments as in the current funding formula.

For more information, see page 51:
Student Success Factor for Economically Disadvantaged Students

Second, the Commission further recommends Instructional Program Factor adjustments to recognize the additional costs for students in specific instructional programs. These include:

- **Multilingual learners**, who require additional support in learning English. We propose a set of tiered weights for MLLs based on their level of English proficiency.

For more information, see page 51:
Multilingual Learners

- **Students with disabilities**, who have legally mandated services as part of their Individualized Education Programs (IEPs). We propose tiered weights based on students’ level of disability and service level identified in their IEPs. This includes students in early childhood settings, who should be included in districts’ average daily membership.

For more information, see page 52:
Students with Disabilities

- **Students in high-cost CTE programs**, where lab space or specialized instructional materials require additional expenditures.

For more information, see page 52:
Career and Technical Education



These weights are additive.
Thus, we define the cost of educating an individual student as:

$$CEA \times (1 + SSF + \text{Instructional Program Factors}) \times k$$

One tenet of a student-centered funding system is that each public school student gets the funding they require based on their instructional needs. Rhode Island students attend different types of public schools—traditional public schools, charter schools, state-operated schools, and collaboratives. In particular, there are currently active policy debates about the restriction or expansion of charter schools. These are critical questions facing state legislators, and Commission members take different stances on these issues. However, we agree that it is not the role of the state education funding system to make such decisions. Instead, following the principles laid out above, the funding system must ensure that dollars follow students who attend any type of public school in ways that are fair and equitable, taking into account the costs of different instructional needs. We have included specific recommendations to remedy current inequities in the costs incurred by different types of programs (i.e., CTE, charter schools, and traditional public school districts). For example, by the state assuming responsibility for retired teacher pensions and high-cost special education, there should be few differential costs between traditional public school districts and charter schools that currently justify holdbacks. As a result, given the other changes proposed here, the Commission recommends an end to the use of holdbacks when funding students who attend charter schools.

For more information, see page 53:
Charter Schools

For more information, see page 53:
Housing Aid

NOTE: “k” is a mathematically-determined adjustment factor to ensure that the average per-pupil spending in the state reflects the CEA.

Adjustment Factor

The CEA described above represents an average per-pupil spending level from the comparison states (regional average). In other words, it implicitly includes expenditures targeted to economically disadvantaged students, MLLs, students with disabilities, and students in CTE programs. Thus, the proposed funding system requires an adjustment factor such that the funding that follows the average student in Rhode Island is equivalent to the CEA. The current system does not have this adjustment. Instead, it uses lower weights to supplement the (higher, unadjusted) current amount. This implicitly results in a system that provides disproportionately more funding to districts with the fewest economically disadvantaged students and MLLs. The adjustment factor allows the Commission to recommend more generous weights such as those adopted by other states while keeping overall spending aligned with regional averages. The adjustment factor also ensures that each district receives funding based on the students assigned to their district.



03 Required Local Contributions

The Commission recommends a required minimum contribution to education for each municipality with no cap on local contributions. The contribution should be equal to the municipality’s calculated local share. This is a major shift from the current formula and necessary to provide stable and predictable funding. It also ensures that shared costs are indeed shared across the state. Nearly all municipalities currently meet their recommended local contributions, but any failure to fund local students’ education has serious consequences for Rhode Island children and the entire state. Unlike in some other states, the Commission does not recommend that there be a cap on local contributions or that municipalities that choose to contribute more must send additional dollars to the state. Instead, local municipalities can choose to provide additional funding for costs outside of those articulated in the proposed system. It is the Commission’s objective to define the CEA so that it accurately represents the cost to educate Rhode Island public school students, making additional local spending discretionary.

To determine the minimum required local contribution, the state funding system must determine how the state and the local municipality will share the cost of educating all current students within each district. There are three important considerations.

First, the state needs to determine which students the municipality is responsible for. Conceptually, state and municipal dollars follow each individual student to the district that serves them. Each municipality is responsible for supporting the public education costs of students living in the municipality, regardless of whether they attend school in their local district, an out-of-district placement (e.g., CTE, special education), or a charter school.

Second, **the state must determine what share of total educational costs it wants to bear** and what share municipalities (in aggregate) should bear. Note that this decision is different from determining how much state aid individual districts receive—instead, it is about Rhode Island’s total investment (budget) for education. In the current funding

formula, this determination is somewhat complex given that not all educational costs are included in the formula. Thus, the state pays 53% of the costs determined by the current formula, while municipalities pay many educational costs outside of the formula, and the state pays some additional costs (e.g., for high-cost special education). We discuss this issue in more detail in the following section. By clarifying the total educational costs borne across the state, our proposed education funding system helps make this decision more transparent for legislators.

Essentially, the state can calculate the total educational costs and determine what share of those costs it will include in its budget, with remaining costs reverting to municipalities. State legislators need to decide Rhode Island’s total investment in education and what share of educational costs will come from (potentially more progressive but more variable) income taxes that make up the lion’s share of state revenue or (potentially more regressive but more stable) property taxes that make up the lion’s share of municipal revenue. The Commission broadly supports a larger state share and smaller municipal share (i.e., more dependent on income taxes rather than property taxes) but notes that the stability of the property tax base across business cycles is an important counter-balance to the more variable income tax base. The state and municipal governments can also choose to make either property tax rates or income tax rates more (or less) progressive.

Third, **the system must determine how much each municipality should pay**. In the current system, the local ability to pay is determined by using both property wealth and concentration of child poverty. The Commission recommends basing these decisions purely on the municipality’s ability to pay, as determined by the combined assessed value of residential and commercial property. Instead of being factored into a municipality’s ability to pay, poverty is captured in the proposed system through other means like the weight for economically disadvantaged students.

Requiring municipalities to meet their minimum contribution to receive state aid would ensure that no Rhode Island children are underfunded as a result of the municipality where they live. It would also eliminate the need for complex, unclear, and potentially counterproductive maintenance of effort provisions (MOE) provisions. The Commission also recommends that municipalities be

allowed to appeal this contribution in the case of unforeseen financial hardship.

For more information, see page 54:
Defining a Municipality’s Ability to Pay

For more information, see page 54:
What if municipalities do not meet their local share requirement?

For more information, see page 54:
Maintenance of Effort

For more information, see page 55:
Hardship Appeals

Timing

The Commission recommends that the state sign off on multi-year commitments to state aid for education to address two central challenges related to fiscal timing in the current system and to facilitate the implementation of the core recommendations here. Most importantly, the state’s current July 1 budget deadline is inefficient and shifts unnecessary risk onto local school districts. Most municipalities begin their budget process in the spring, and districts must make staffing commitments by late spring. Without clarity and predictability in state funding, districts must often make overly conservative decisions (e.g., notifying teachers that they will be laid off and then trying to hire them back when the budget process is complete). Multi-year commitments would provide districts with reasonable assurance to engage in budgetary planning.

In addition, providing earlier data about expected state aid for education would enable districts and municipalities to use these data in their budgetary processes. Massachusetts requires such data to be available by March 1. Using a similar deadline (or earlier) would potentially allow municipalities to include better preliminary estimates in their local budget processes, ensuring that they have budgeted for sufficient revenue to cover local costs.





04 Financial Responsibility, Reporting, and Strategic Management

The current system does not provide sufficient transparency and accountability for spending state and local funds. Dollars come to districts regardless of how the district has spent past dollars, what student outcomes it is achieving with those dollars, or how transparent they are about the use of funds. The proposed education funding system should thus **include increased requirements for fiscal responsibility, reporting, and strategic management.**

Reaping the benefits of a more equitable education funding system requires increased attention to ensuring that funds are spent efficiently and effectively to promote our state’s educational goals. The Commission agrees that it is critical to tie educational expenditures directly to improved student outcomes. The requirements for fiscal responsibility, reporting, and strategic management should do at least three things:

- 01**

Promote robust district planning and strategic management that ties spending to educational outcomes;
- 02**

Ensure clear transparency of these plans, spending, and outcomes.
- 03**

Provide oversight, tiered supports, and capacity-building as needed to ensure that goals are being met.

We use the term fiscal responsibility to mean that a district uses its funding legally and responsibly. Districts use strategic management to ensure that these funds are being spent efficiently and effectively to meet their goals. They must transparently report on planning, spending, and outcomes so that external stakeholders can assess their performance. While the Commission is wary of creating micromanagement of public education, the public requires some additional insight into how dollars are being spent and how those investments are leading to student outcomes. In other words, these requirements are the mechanisms to hold districts accountable for the use of taxpayer dollars.

There are three main audiences:

- A.** School boards and the taxpayers, students, and families they represent, who ultimately bear the costs and benefits of local public education
- B.** Municipal leaders, who are now required to contribute dollars to local schools
- C.** The state, which provides substantial dollars via state aid to districts

We should be clear that this system is distinct from the state’s formal school accountability system that provides star ratings for schools. While these two systems should align and be coherent, they are not the same thing.

Rhode Island already has a key resource for fiscal reporting—a system for tracking detailed spending in school districts. The state’s education spending data platform, the Universal Chart of Accounts (UCOA), has real potential to bring clarity and transparency to education funding. Some districts use UCOA regularly and have integrated it into their financial systems, allowing for its use in planning and reporting. Others, however, have not. More consistent and comprehensive use can transform statewide UCOA reporting from a compliance-focused administrative lift for districts to a transparency and efficacy-focused process that highlights real strengths and areas for growth, informing improvement efforts and the knowledge of students, parents, and districts.

Below, we describe in more detail proposed requirements that would accompany state funding for education. If these requirements are not met, the state could withhold state aid for education from districts.

**For more information, see page 55:
*What is Fiscal Responsibility?***

Local Planning and Strategic Management that Ties Spending to Educational Outcomes

Success for any complex organization requires detailed planning and strategic management that connects spending to core outcomes. School districts are no exception. Here, the Commission has three main recommendations.

First, the central role of school committees is to provide governance and oversight of school districts. They are the main body that provides public oversight into district practice and allows students, families, and taxpayers to understand the district’s financial decisions. To facilitate this oversight role, **each district should be required to make, at minimum, an annual public presentation that describes spending, discusses progress towards outcomes,** and identifies ways to adjust spending and practice to ensure efficient and effective use of public dollars. These conversations can also highlight whether certain sources of spending are not having their intended impact and how the district plans to reallocate dollars to achieve those goals. For example, if the district is not having success with multilingual learners, it should articulate a plan to use additional dollars to support these students. To support these presentations, the Rhode Island Department of Education (RIDE) could produce district-level slide decks based on UCOA and outcomes data. The Commission envisions that these presentations would be provided not only to the school committee but also to city/town councils.

Second, **districts must meet at least annually with RIDE to engage in a similar reflection and planning process.** During this process, RIDE can provide technical assistance in financial planning and monitoring, thereby building district capacity for outcomes-based financial management. As described below, districts that require more support will have more frequent meetings.

Third, a fundamental requirement is that districts spend dollars in legal ways free of malfeasance and abuse. The Commission recommends maintaining periodic audits of district spending to identify such challenges and provide additional information for state and local leaders as needed.

Transparency of Plans, Spending, and Outcomes

Transparency in spending provides state officials, local leaders, and the public with insight into how public dollars are being used. Some districts do this well, with clear, detailed, and publicly available information about spending; others, however, provide only high-level financial statements that do not allow the public to understand district budget choices. Many of the activities described above related to planning and strategic management also serve the goal of making spending data and decisions more transparent to stakeholders. More transparent data about spending, plans, and outcomes will yield critical information to enable public accountability. As families and local community members gain access to more district information, they can take more ownership and investment in the success of their community’s schools.

Here, the state’s UCOA data system provides a ready opportunity for more transparent financial reporting. **We recommend that all districts use UCOA in a detailed and consistent way.** Specifically, districts should regularly provide detailed budget and expenditure data via the UCOA system, following consistent definitions across the state. This reporting will ensure that financial information is consistent, accurate, complete, and timely. Meeting these reporting deadlines should be a requirement of receiving state aid for education.

Of course, creating new reporting systems can also be very costly and ultimately not useful. The state should balance ease of use with the insight that districts and the state can gain from the system. In particular, ongoing UCOA reporting is straightforward and efficient if district systems align with state data requirements. Once budget templates are built and implemented to align with UCOA, data transfer is efficient and districts can use these data readily for planning. However, some districts will require technical assistance and support to achieve this alignment. As a result, **we recommend a UCOA transition fund and state-provided technical assistance to support these district efforts.**

In addition, **the Commission recommends that the state invest in refining its current report card website and UCOA dashboard to create a more actionable tool** that includes detailed spending data and student outcome data presented in an easily accessible and visually engaging way. Current UCOA data tools have rich information, but



inconsistent use across districts and the vast amount of information reported make them somewhat less accessible and actionable to the public. The Commission recommends revising these existing dashboards or developing new ones to facilitate public understanding. This dashboard would be more locally responsive and actionable than existing UCOA data tools or school report cards. It should also prioritize student learning gains and other measures of academic progress connected to educational expenditures. And, the Commission recommends that they allow for district-by-district (or school-by-school) comparisons of spending, outcomes, and student demographics. These efforts will increase transparency for how public dollars are spent and bridge the gap between school accountability and fiscal responsibility systems. They will also serve as a key input for district financial planning and management.

Oversight, Tiered Supports, and Capacity-Building to Ensure that Goals are Being Met

One key layer of the accountability embedded in this system comes from the public and local governance structures. Here, ensuring more transparency and public reporting provides the public and local officials with much more information and enables them to hold districts accountable.

However, given that state dollars are being spent, the state also needs to have systems in place. Most importantly, these systems should provide collaborative support for districts to meet their goals. They should also provide consequences for districts that do not. In the current system, there are limited formal consequences short of state intervention, which is a major step.

The Commission sees real value in transparency and oversight, but the goal of the system we recommend is NOT micromanagement. Districts should have substantial autonomy to manage their spending and achieve their educational goals. Municipal leaders and the public should have insight into how dollars are being spent and whether districts are indeed achieving their goals. Finally, the state should provide similar oversight, with additional requirements for any districts that are not making progress.

The Commission recommends a system of tiered supports and consequences for districts struggling to make progress. In this system, most districts will face no consequences. Those that require additional support will first engage in collaborative technical assistance and planning.

If a district continues to struggle, additional support will include required co-planning and eventually potential state direction of district spending. Many of these activities already occur in some form, just not in direct connection to school spending. For example, the state already approves district plans for federal fund use and collects district strategic plans. However, these strategic plans are not connected in any way to the use of state dollars. This means the goal setting support the state provides stops short of implementation and thus limits its impact. Making these connections clearer and the planning and governance processes more coherent will allow the state, municipal officials, and the public to see how dollars are being used strategically to advance specific priorities and then to examine the outcomes of those decisions to inform reallocation.

The Commission recognizes that RIDE has critical expertise in this area and should provide technical assistance to districts; however, doing so will require additional capacity. The system should be overseen by an independent state Fiscal Responsibility Board with clear relevant expertise. Other states, including Maryland’s Accountability and Implementation Board, have similar bodies. Collectively, this Board needs expertise not only related to fiscal management but also in K-12 education and the strategic use of dollars to advance organizational goals. It should include representatives from state organizations for superintendents, school committees, municipalities, teachers, principals, and charter schools, as well as representatives from RIDE. It should also include community members with expertise in education, finance, and strategic management.

RIDE has a key role in providing effective and timely support to school districts to meet the standards and expectations within the system. RIDE should first and foremost be a source of clear guidance and training for local education staff. This can be done by providing high capacity that will enable it to support districts across the state.

**For more information, see page 56:
Tiered System of Support**



Additional Notes for Rhode Island Policy Makers

Unfunded Mandates:

New legislation and regulations often create requirements that place substantial costs on districts. The proposed education funding system aims to include all educational costs in the CEA. **Therefore, any new legislation or regulation should include a cost study** that provides information about the cost required to implement it effectively. The legislature should strongly consider allocating additional dollars for implementation when imposing new requirements.

Early Childhood Education:

The landscape of early childhood education (birth to age 5) in Rhode Island is highly fragmented, involving multiple providers (public and private), funders, and state regulatory agencies. The federal government plays a significant role in overseeing and funding Early Head Start and Head Start programs statewide. The current system is disjointed and insufficient, leaving many families without access to high-quality early childhood education. These challenges limit economic opportunities for workers with young children and limit educational opportunities for young children.

Creating a more comprehensive and higher quality early childhood education system for young children across the state would pay substantial dividends, including for the ability of districts to better serve the children who enroll in kindergarten after they reach age 5. Participation in high-quality early childhood education programs from birth through kindergarten entry helps to ensure children enter school with the skills needed to succeed. Decades of research has shown that high-quality early childhood education programs, including preschool, help children gain academic and socioemotional skills prior to school entry and produce positive outcomes that last well into the school years and adulthood, including reduced need for special education services, improved high school graduation rates, greater participation in post-secondary education and training, and reduced incarceration rates. However, while the early childhood education system directly affects districts in many ways, such a proposal is beyond the scope of this Commission. We **recommend that the state create a Commission to study early childhood education in detail to improve this system.**

Some districts also provide preschool services directly, largely through RI Pre-K. These services should **continue to be funded categorically through the RI Pre-K program**. As we described above, our proposed funding system would include additional dollars for early childhood special education services, for which districts are responsible regardless of the student’s setting. These funds would support students in RI Pre-K, other in-district preschool programs, and out-of-district settings (including private preschools).

07

Putting It All Together: What the New System Means in Practice

The Commission’s proposed funding system aims to clarify educational costs and ensure that costs are shared fairly between the state and municipalities. That is, this proposal makes clear the costs required to educate students and who pays these costs. We illustrate this below using data from FY 2024, the most recent year for which complete data are available as of this writing, to look at what our proposal would mean for actual numbers in state and local budgets.

this would be \$22,093, compared to the current FY 2026 CIA of \$13,322. Again, this reflects one of the Commission’s central recommendations of shifting more educational costs from those borne solely by municipalities to shared costs between the state and municipalities.

For more information, see page 57:
Calculating the Core Education Amount

For more information, see page 57:
Shared Educational Costs

About the Data

We draw from several data sources, including UCOA, state pension data, and state funding formula allocations. Given that these sources are not entirely consistent across districts we have done our best to provide apples-to-apples comparisons. While we believe the numbers below are as accurate as possible given the available data, some may change as final calculations are made. For example, we expect that the cost to the state for assuming full responsibility for early childhood screening will increase given that universal screening of this sort (although required by federal law) does not currently exist in the state.

How Educational Costs are Calculated

Currently, the state spends roughly \$3 billion dollars on public education from state and municipal sources. These costs include those accounted for in the current funding formula, those that the state pays directly through other avenues, and those that municipalities bear directly without any state share, such as building maintenance and in-district transportation. Of the \$3 billion dollars spent on education, just 68% of costs are accounted for in the current funding formula (both state and municipal share). Districts alone pay more than \$500 million in costs outside of the current formula.

In our proposed funding system, total education funding in the state is calculated based on regional average educational expenditures, as embodied in the CEA. In FY 2026,

How Educational Costs Are Shared

Once the total level of required educational funding across the state is calculated, policymakers face a key decision—what share of these funds will come from the state and what share from municipalities. Again, this is determined by state policymakers’ decisions about the balance between using state income tax revenue or local property tax revenue to fund public education. The Total State Share determines the state’s education budget and the required contributions from municipalities.

We present several scenarios in Table 1. In Scenario 1, imagine the state decides to invest more state revenues in education by continuing to support 58% of the total foundation cost—the current rate at which it funds education—calculated with the expanded CEA. The contribution required from municipalities will be substantially smaller than it currently is. Scenario 2 holds constant the current total state education budget (\$1.57 billion in FY 2026), requiring larger municipal contributions in order to reach the total education expenditure determined by the CEA.

The Total State Share shapes municipal and state education budgets.

Table 1:
*State and Municipal Budget Scenarios for Traditional Public Schools
(FY 2026 Estimates using FY 2024 Data)*

	Current	Scenario 1 58% State Share	Scenario 2 38% State Share
Total Foundation Cost	\$2.09B	\$2.91B	\$2.91B
State Formula Aid	\$1.22B	\$1.69B	\$1.09B
State Costs	\$0.36B	\$0.48B	\$0.48B
Total State Education Budget	\$1.57B	\$2.16B	\$1.57B
Total Municipal Education Budget	\$1.50B	\$1.22B	\$1.81B
Total Education Expenditure (State + Municipal)	\$3.07B	\$3.38B	\$3.38B

What Does This Look Like at the Municipal/District Level?

The calculations above provide an overall view from the state level. How these funds are allocated across municipalities and school districts depends on the types of students a district serves and the municipality’s ability to pay. The Commission’s proposal to base ability to pay on property assessments means that some districts will get less state formula aid, but the shift of responsibility for some of the largest and least predictable costs to the state will also benefit these districts.

The first step here is calculating the foundation cost, or the cost of educating current students, for each district. Given

the principle that the state’s education funding system should be student-centered, this depends on knowing the types of students the district serves, specifically the share of economically disadvantaged students, multilingual learners, students requiring special education services, and students in high-cost CTE programs*. In Table 2, we show an example of how this would work by district, focusing on traditional public school districts. Note that for all districts, the Proposed Foundation Cost (first column) is greater than the Foundation Cost from the current formula (second column) due to the expanded CEA including many more types of expenses as shared costs.

For more information, see page 57:
Weighted Student Funding and the Adjustment Factor

**We focus on economically disadvantaged students and multilingual learners because the Commission proposes that other bodies determine the specific weights related to students with disabilities and high-cost CTE programs. In other words, actual district funding levels will differ, then, but in ways that are directly aligned to instructional costs.*



How these costs are shared, then, depends on the Total State Share and the municipality’s ability to pay—as determined by the total adjusted equalized weighted assessed valuation (AEWAV). As an example, let’s assume for now that the Total State Share remains at 58%. With \$179 billion in assessed property value, municipalities would be required to allocate revenue equivalent to a 0.68% tax rate to achieve the nearly \$1.2 billion in required municipal

contributions. Note that this rate would be calculated each year given the total costs and the Total State Share. Crucially, this rate defines each municipality’s minimum local contribution.

Table 2:
Proposed Foundation Cost and Minimum Local Contribution
(FY 2026 Estimates using FY 2024 Data), Assuming 58% Total State Share

District	Proposed Foundation Cost	Current Foundation Cost	Proposed Minimum Local Contribution	Current Minimum Local Contribution*
Barrington	\$58.7M	\$44.7M	\$48.3M	\$34.8M
Bristol-Warren	\$53.1M	\$39.8M	\$44.6M	\$29.1M
Burrillville	\$38.9M	\$29.2M	\$18.3M	\$15.6M
Central Falls	\$67.5M	\$44.8M	\$3.1M	\$1.5M
Chariho	\$52.8M	\$39.9M	\$52.2M	\$25.1M
Coventry	\$78.9M	\$59.3M	\$34.6M	\$31.0M
Cranston	\$204.3M	\$149.4M	\$77.3M	\$69.5M
Cumberland	\$90.9M	\$68.2M	\$48.1M	\$39.9M
East Greenwich	\$44.9M	\$34.1M	\$43.8M	\$29.6M
East Providence	\$104.6M	\$77.0M	\$44.2M	\$37.6M
Exeter-West Greenwich	\$28.2M	\$21.4M	\$18.6M	\$14.2M
Foster-Glocester	\$33.3M	\$25.3M	\$19.1M	\$15.8M
Jamestown	\$9.7M	\$7.4M	\$9.7M	\$7.0M
Johnston	\$69.0M	\$50.5M	\$31.3M	\$26.4M
Lincoln	\$63.1M	\$47.3M	\$31.1M	\$26.4M
Little Compton	\$4.7M	\$3.6M	\$4.7M	\$3.3M
Middletown	\$37.0M	\$27.5M	\$37.0M	\$21.4M

*We calculate the current minimum local contribution by taking the difference between the current foundation cost and the current state formula aid.

In Table 2, we show the results of this calculation, assuming a 58% Total State Share. As described above, the Commission does not recommend that the state recapture local property tax revenues to distribute to other municipalities and thus we cap local contribution requirements at the Proposed Foundation Cost. This cap disproportionately benefits communities with high property wealth.

District	Proposed Foundation Cost	Current Foundation Cost	Proposed Minimum Local Contribution	Current Minimum Local Contribution
Narragansett	\$17.5M	\$13.2M	\$17.5M	\$11.5M
New Shoreham	\$2.3M	\$1.7M	\$2.3M	\$1.6M
Newport	\$42.2M	\$29.7M	\$42.2M	\$15.5M
North Kingstown	\$68.6M	\$51.4M	\$58.2M	\$38.9M
North Providence	\$72.9M	\$53.1M	\$23.5M	\$22.7M
North Smithfield	\$30.2M	\$22.7M	\$16.1M	\$13.5M
Pawtucket	\$189.9M	\$132.5M	\$36.0M	\$21.9M
Portsmouth	\$37.5M	\$28.3M	\$37.5M	\$25.5M
Providence	\$520.9M	\$352.1M	\$89.8M	\$54.6M
Scituate	\$21.4M	\$16.2M	\$15.9M	\$12.0M
Smithfield	\$43.8M	\$33.2M	\$29.0M	\$22.6M
South Kingstown	\$44.6M	\$33.6M	\$44.6M	\$28.5M
Tiverton	\$30.3M	\$22.8M	\$25.7M	\$17.5M
Warwick	\$160.2M	\$119.2M	\$91.8M	\$70.6M
West Warwick	\$76.2M	\$55.6M	\$18.4M	\$13.5M
Westerly	\$43.6M	\$32.5M	\$43.6M	\$24.3M
Woonsocket	\$141.0M	\$98.6M	\$14.1M	\$10.4M

Table 3:
Proposed State Formula Aid and State-Covered Costs
(FY 2026 Estimates Using FY 2024 Data), Assuming 58% Total State Share

District	Current State Formula Aid	Proposed State Formula Aid	Proposed New State-Covered Costs	Proposed Total State Aid	Change in Total State Aid
Barrington	\$9.9M	\$10.4M	\$7.9M	\$18.2M	\$8.3M
Bristol-Warren	\$10.7M	\$8.5M	\$8.8M	\$17.3M	\$6.6M
Burrillville	\$13.5M	\$20.6M	\$4.0M	\$24.6M	\$11.1M
Central Falls	\$43.4M	\$64.4M	\$6.1M	\$70.6M	\$27.2M
Chariho	\$14.8M	\$0.7M	\$6.4M	\$7.1M	-\$7.7M
Coventry	\$28.3M	\$44.4M	\$9.3M	\$53.6M	\$25.3M
Cranston	\$79.9M	\$127.1M	\$24.2M	\$151.3M	\$71.3M
Cumberland	\$28.2M	\$42.8M	\$7.9M	\$50.7M	\$22.5M
East Greenwich	\$4.5M	\$1.1M	\$5.3M	\$6.4M	\$1.9M
East Providence	\$39.3M	\$60.4M	\$12.3M	\$72.7M	\$33.3M
Exeter-West Greenwich	\$7.1M	\$9.6M	\$4.4M	\$14.0M	\$6.9M
Foster- Glocester	\$9.5M	\$14.2M	\$3.7M	\$17.9M	\$8.4M
Jamestown	\$0.4M	\$0.0M	\$1.9M	\$1.9M	\$1.6M
Johnston	\$24.1M	\$37.8M	\$8.5M	\$46.3M	\$22.1M
Lincoln	\$20.9M	\$32.1M	\$7.4M	\$39.4M	\$18.5M
Little Compton	\$0.3M	\$0.0M	\$0.6M	\$0.6M	\$0.3M
Middletown	\$6.2M	\$0.0M	\$5.8M	\$5.8M	-\$0.4M
Narragansett	\$1.7M	\$0.0M	\$3.4M	\$3.4M	\$1.7M

Importantly, this table only shows the proposed local contributions, excluding the proposed state formula aid and additional contributions the state would make in our proposal to cover legacy pension benefits and other costs not reflected in the current system. Thus, implied state aid is substantially higher to all districts. We show what

this looks like in Table 3, where we include both the new state formula aid and the other new costs that we propose the state take on. Thus, across the board, districts are benefiting from additional costs being covered by the state.

District	Current State Formula Aid	Proposed State Formula Aid	Proposed New State-Covered Costs	Proposed Total State Aid	Change in Total State Aid
New Shoreham	\$0.1M	\$0.0M	\$0.4M	\$0.4M	\$0.3M
Newport	\$14.2M	\$0.0M	\$6.5M	\$6.5M	-\$7.8M
North Kingstown	\$12.5M	\$10.4M	\$8.5M	\$18.9M	\$6.4M
North Providence	\$30.4M	\$49.3M	\$8.1M	\$57.4M	\$27.0M
North Smithfield	\$9.2M	\$14.1M	\$3.6M	\$17.7M	\$8.5M
Pawtucket	\$110.6M	\$153.9M	\$20.0M	\$174.0M	\$63.4M
Portsmouth	\$2.8M	\$0.0M	\$4.5M	\$4.5M	\$1.7M
Providence	\$297.5M	\$431.1M	\$52.2M	\$483.2M	\$185.7M
Scituate	\$4.3M	\$5.4M	\$2.2M	\$7.7M	\$3.4M
Smithfield	\$10.6M	\$14.8M	\$4.7M	\$19.5M	\$8.9M
South Kingstown	\$5.1M	\$0.0M	\$6.6M	\$6.6M	\$1.6M
Tiverton	\$5.3M	\$4.6M	\$4.6M	\$9.2M	\$3.9M
Warwick	\$48.6M	\$68.4M	\$14.7M	\$83.1M	\$34.5M
West Warwick	\$42.1M	\$57.7M	\$9.8M	\$67.5M	\$25.4M
Westerly	\$8.1M	\$0.0M	\$6.8M	\$6.8M	-\$1.3M
Woonsocket	\$88.1M	\$126.9M	\$15.4M	\$142.3M	\$54.2M

Aligning the Education Funding System with Changing Fiscal Conditions and Policy Needs

The education funding system we describe establishes a level of funding consistent with regional expenditures and other state policy decisions. However, we envision many scenarios where the state might not want to simply keep pace with regional peers. For example, to close performance gaps between Rhode Island students and their peers across the country, the state would likely need to exceed the investment levels of regional peers. The Commission recommends such additional investment in public education for reasons laid out above. Furthermore, if federal funding for public education is cut, the state may want to provide additional supplemental funding for schools. On the other hand, a financial downturn or shifts in public policy priorities might mean that the legislature would like to limit the total state investment in education.

In such instances, the Commission recommends that the legislature scale the cost of the entire education funding system up or down to meet the desired budget, rather than adjusting specific pieces of it to change total funding (such as limiting the identification of economically disadvantaged students or changing inflation adjustment calculations, as the state has done in recent years). If the state wants to spend more (or less) than the system calculates, it should scale the entire cost and leave the system's underlying principles intact.

For more information, see page 58:
Adjusting State Expenditures

For more information, see page 58:
Phase In



08

Recommendations in Detail

01 Account for the full cost of education in the funding system and share those costs more equitably.

Core Education Amount

Rhode Island's current funding formula uses a regional average of instructional expenditures (from Connecticut, Massachusetts, Rhode Island, and New Hampshire). It essentially calculates the average per-pupil instructional expenditures in this region, as reported to federal sources from the most recent available year. This system has generally been effective in ensuring a sufficient level of funding and keeping Rhode Island's education spending aligned with that of other states. The Commission recommends keeping this system but making it more comprehensive.

Districts bear many costs that are not included in the current CIA (e.g., building maintenance, food service, transportation), meaning the state does not help cover them. Consequently, these costs disproportionately affect municipalities with limited ability to pay. The proposed funding system should include these costs and others to fully reflect educational or related costs.

As a result, the Commission recommends that instead of using just instructional expenditures, the state should use current educational expenditures from this regional peer group. Current educational expenditures include instructional costs as well as support services, transportation, building maintenance, and other expenditures. These costs are clearly critical for instruction. Note that current expenditures do not include payments to private and charter schools, capital outlays, or debt service.

The Commission notes that this CEA reflects a floor, not a ceiling. The

proposed funding system should define a minimum CEA from this regional average, and the legislature should have the flexibility to increase the amount annually. The regional averages provide a sufficient financial foundation for education. However, political and community leaders have expressed a strong rationale for the state's public education system to go beyond this "sufficient" level. The state's Portrait of a Graduate and recent graduation requirements already reflect this appetite for a more expansive (and costly) education system.

High-Cost Special Education

Most students with disabilities will be covered via a tiered weighting system described below. However, districts serve a small number of students with disabilities whose instructional costs are exceptionally expensive. These students are typically placed in expensive out-of-district settings (often private). Because these costs are tied to individual students, they are quite variable across districts, as having just one student move can substantially shift costs for a small district. Thus, the Commission recommends that high-cost services be directly reimbursed or paid for by the state.

There are two additional challenges with the current system. First, it only reimburses costs that exceed four times the state's average per-pupil expenditure. Districts must cover the difference.

Second, the state includes these dollars in a district's allocation the following year, which misaligns revenues and costs and creates serious budget strain for district leaders. The Commission recommends that the state should take on all costs for high-cost special education students. The state should either pay providers directly for these costs or reimburse districts as costs occur, rather than on a year lag. This will shift risk from school districts and

municipalities to the state. It will also remove potentially adverse incentives for residential choice for such students.

Additionally, we recommend that the state cap tuition reimbursements by service category. Other states, including Massachusetts, have done this, which has helped reduce the often exorbitant tuition costs for these placements. The state could also consider creating regional centers for certain services (as it does with the Rhode Island School for the Deaf). While this could provide important efficiencies, the state must pay clear attention to the critical issues of isolation and segregation that might arise.

Transportation

The existing system does not account for districts' transportation costs, which then fall squarely on local districts and municipalities instead of being shared costs. The Commission's recommendations largely resolve this challenge by including in-district transportation costs in the proposed CEA.

The Commission also recommends that the state bear out-of-district transportation costs. Much like high-cost special education services, out-of-district transportation costs hit different districts in different ways. The costs are variable and largely do not reflect districts' instructional decisions. As a result, having the state fund out-of-district transportation costs aggregates risk to a higher level of government and ensures equity across districts.

The Commission sees a clear opportunity to increase bargaining power through statewide or regional collaboratives engaging with transportation providers. While regional efficiencies are critical to explore in a small state with many districts, including transportation costs in the proposed funding system ensures districts retain the ability to make their own decisions.

The Commission also recommends that

the state cease funding private school transportation and reallocate those dollars to fund the transportation of CTE, foster, and homeless students in the public school system.

Early Childhood Screening

The Individuals with Disabilities Education Act (IDEA) requires that the state have policies to locate, identify, and screen all children with disabilities (34 CFR §300.111). Currently, districts manage the process of screening children aged 3 to 21 and referring them for evaluation. This system is fragmented, insufficient, and inefficient.

Post-pandemic, only one in three preschool aged students in the state was screened, with rates in the core cities falling below state averages^{viii}. As a result, many children who require preschool special education services are not identified^x. Compounding this issue is that districts are required both to screen children and to provide the services identified, which may create an adverse incentive for districts to limit identification. Lack of consistent screening tools also means that the system does not integrate well with early intervention services, leading students to get lost during the hand-off and requiring redundant screenings.

The Commission recommends universal screening for all students ages 3 to 5 using a universal screening tool to ensure more consistent implementation and equitable access to early identification and intervention. Using a common tool that all districts accept will improve equity and create important efficiencies across the state as students move across systems. Screening all (or nearly all) students will ensure that no students enter Kindergarten without having been identified.

We also recommend shifting primary responsibility for screening to the state. The state would create a system to ensure universal screening and fund

that system. The current system provides no funding for screening, evaluation, or preschool special education services, which creates disincentives for districts to limit screenings and identify fewer students. We recommend breaking the link between screening and service delivery by transferring this responsibility from districts to the state.

Teacher Pensions

The state teacher's retirement system is complex. The benefits and challenges of this system fall outside the scope of this Commission's work, and our recommendations do not at all affect the level of benefits provided via the state pension system. However, taking the current system as is and anticipating future changes to it, the Commission recommends substantial shifts in who funds teacher pensions.

Pension liability has important implications for district finances. Recent estimates suggest that the share of state and local K-12 spending toward teacher retirement costs has risen from 3.45% in 2002 to 7.25% in 2020. At the local level, these pension payments seem to be crowding out spending on current teachers and other educational costs. From 2002 to 2022, teacher salaries (adjusted for inflation) decreased by about 8%. As enrollments continue to decline statewide, these challenges will become more acute, particularly in the short term.

Here, we differentiate two conceptually distinct pieces of a district's pension liability. The first is the annual cost of newly accrued benefits—the “normal” costs—which are payments to support pension and retirement benefits for current teachers. The second are payments to support the cost of benefits for teachers who are already retired. These payments amortize the so-called “unfunded” portion of projected benefit costs (legacy debt). Currently, the state pays 40% of the costs for both categories, and districts are responsible for

the remaining 60%.

The Commission's proposed CEA now directly includes the annual cost of newly accrued benefits (“normal” costs). By including current educational expenditures, pension costs for current teachers are automatically factored into the proposed education funding system. Traditional public school districts and charter schools all must pay these costs. Given that these costs derive in part from local negotiations, it makes sense that each district pays these costs and that these payments reflect the “full” cost of these future benefits. That is, districts (including charters) should fully fund retirement benefits for their current teachers to avoid leaving unfunded liabilities for future generations. Given that these costs are included in the proposed CEA, we recommend that districts be fully responsible for making these payments, utilizing revenue from state aid and local contributions. The state would cease covering 40% of these costs directly.

The second part—paying for the “unfunded” or legacy pension liability—represents a significant challenge for district finances. We recommend that the state directly bear the cost of these payments for three main reasons. First, the effective costs depend on shifts in staffing and student enrollments. As demographic changes have led to enrollment declines in nearly all districts, the per-pupil share of these costs is growing. Second, these costs depend on prior investment returns, so they can differ substantially from year to year. The state is better able to absorb this unpredictable risk than districts. Third, these costs were accrued in the past and are not related to the instructional needs of any current student. As a result, it makes sense for the state to take on these liabilities. This change benefits districts with declining enrollments, those with higher retiree pension costs, and those with larger local contributions.

02 Tailor Instructional Costs per Student More Directly

Student Success Factor for Economically Disadvantaged Students

Districts serving economically disadvantaged students should receive additional funding to support the increased educational costs of serving these students. The Commission proposes an additional weight of 50% for each student who would qualify for federal free or reduced price lunch (i.e., <185% of the federal poverty level). The Commission considered differentiating poverty weights by family income level but decided to err on the side of simplicity. This approach is consistent with practices in 35 states and the District of Columbia, which provide additional state aid in their funding formulas for economically disadvantaged students via per-student weights. Individual student weights range from 2.2% of foundation aid (Arizona) up to 86% (Maryland).

The Commission also considered an additional weight for districts with large concentrations of economically disadvantaged students. Twenty-eight states provide such funds for concentrated poverty. Some of these states (like California) use a comparatively low weight for individual students combined with a generous weight for concentration, while others (like Tennessee) do the reverse. Still others (like Maryland, Kansas, and Connecticut) have set generous weights for both categories. Ultimately, the Commission decided to err on the side of simplicity and transparency by adopting a more generous per-student weight. This ensures communities with many economically disadvantaged students will still receive substantially more funding than those with fewer students.

The Commission strongly believes that

the current system for calculating the share of economically disadvantaged students is fundamentally broken, relying on incomplete data and an adjustment factor applied uniformly across all districts. The Commission recommends that the state invest in data systems to be able to identify accurately and efficiently the number of economically disadvantaged students in each district.

Other states use different methods here. The most promising approaches include connecting to the state income tax system to ensure accurate and complete data and limit administrative burden. This would allow for immediate and very inexpensive matching to tax records to obtain an accurate indicator of a student's economically disadvantaged status. When students do not match to state income tax records, it can be assumed that they are economically disadvantaged.

Other alternatives include using district-collected free and reduced price lunch eligibility forms (which is administratively burdensome and undercounts students). A better method is direct certification of students receiving other state benefits; if this is used, the state should utilize as many public benefit programs as possible. In all cases, the goal should be to accurately identify all economically disadvantaged students, even those who do not take advantage of other state programs. In general, the Commission recommends that identification should be done using links in administrative data as much as possible, with the option for districts to collect supplemental data to certify additional students as needed.

Multilingual Learners

Multilingual learners require additional instructional supports that yield additional costs. The nature of these supports depends on the students' English proficiency level. New arrivals and students with very limited English

skills require more substantial investment; those who are close to the MLL exit criteria require fewer services. Federal law requires that districts must monitor students who exit MLL services for two years, adding an additional cost to districts. The Commission recommends a set of tiered weights based on the types of services that MLL students are receiving.

Because identifying services is challenging, the Commission recommends tiered weights tied to students' level of English proficiency measured by the WIDA/ACCESS test, as follows:

- Proficiency Levels 1 & 2 = 60%
- Proficiency Level 3 = 40%
- Proficiency Level 4+ and still MLL = 20%
- Former MLL for two years (to support monitoring) = 10%

Most other states (37) include MLLs in their funding formulas using a per-student weight. The amounts of these weights range from an additional 5% of the foundation amount (Colorado) to an additional 100% (Georgia and Maryland). Six other states apply tiered weights for MLLs based on their English proficiency, as we recommend.

The Commission also discussed the role of categorical funds. There are important questions about whether to include funding for MLLs (or other groups of students) in the formula itself or as categorical funds tied directly to these groups. The Commission believes that formula aid is more stable, generous, and predictable than year-to-year categorical funds. There are important concerns that these dollars may not be spent on the populations of interest (in this case, MLLs). However, we think this risk can best be managed by giving districts flexibility and using the state's fiscal responsibility and reporting system to ensure that special student populations are making progress. For example, funding used to support quality instructional programming and staffing could

also benefit MLLs and students with disabilities, especially in districts with high shares of those groups. A district may find it more effective to make marginal investments in instructional programming rather than standalone programming for special student populations. Furthermore, state and federal laws define required services.

Students with Disabilities

Like MLLs, students with disabilities require additional services that differ in their cost. These services are necessitated by IDEA and districts are required to provide them. Thus, when the funding system does not account for the actual costs of such services, there are fewer resources available to support the instructional needs of all students. Given our interest in an equitable system that allocates resources according to instructional need, the Commission recommends a system that offers multiple weights by the cost of services required.

Thirty states and the District of Columbia currently include weights for students with disabilities in their funding formula^x. Most of the remaining states provide funding equally across all districts with the assumption that students with disabilities—and the costs of their instructional needs—are evenly distributed. This assumption does not reflect the reality in Rhode Island. In Woonsocket, for example, 28% of students require special education services, compared to just 13% in Barrington.

Among states that differentiate funding for students with disabilities, approaches are quite varied. Eight states provide additional funding for students with disabilities using a uniform weight, like with other high-need student populations. These single weight approaches are generous, ranging from 75% to 160% of the foundation amount. More states use multiple weights tiered by disability

diagnosis, type of services required by IEP, student placement, or incidence/severity of disability. We recommend that the proposed funding system account for the cost of services required rather than severity of disability or other options because it aligns funding more directly to instructional costs.

Recognizing that there is a range of costs associated with special education services, the Commission recommends that RIDE assist in the development of parameters for a set of tiers that would be used to determine the Instructional Program Factor adjustment for students with IEPs. At one end of the continuum of costs will be high-cost special education as it is currently defined; the Commission recommends that the state cover the entire cost to educate this group. At the other end of the continuum of costs will be students with IEPs who receive support within their classrooms and other existing structures that do not involve additional costs; no factor adjustment will be applied for this group. The Commission recommends that three tiers between these two ends be defined to represent distinct levels of additional instructional cost (associated, for example, with additional staffing needs, adaptive equipment, or un-reimbursed contracted services).

Early Childhood Special Education Services

Students in preschool are a special category. Under IDEA, once students are identified through screening as potentially needing services, districts must conduct comprehensive evaluations to determine eligibility, develop IEPs, and provide these services regardless of setting. While districts have a legal obligation to provide preschool special education services, they do not receive explicit funding for them through the existing funding system.

Given the principle that the proposed system should allocate costs to districts

based on their students' instructional needs, the Commission proposes that preschool students between the ages of 3 and 5 who are receiving special education services be included in a district's Average Daily Membership, even if that child is receiving special education services in a community setting, a RI Pre-K classroom, or an out-of-district placement. Of course, costs are substantially different based on delivery model and level of service. As a result, we recommend developing a set of weights that broadly align with those for K-12 special education, differentiated by level of service, whether the student is in a full-day or part-day setting, and type of placement. Students in half-day preschool programs would be eligible for 50% of the rates. Again, we recommend that RIDE coordinate the development of these tiers.

Career and Technical Education

There are two primary costs associated with CTE programs—the start-up costs of program development and the ongoing additional costs associated with running the program. To address start-up costs, the state should provide categorical funds for developing new high-quality programs in high-need areas differentiated by cost.

For the additional costs of running CTE programs, the Commission recommends that the state establish a standard CTE Education Amount for each program. Some programs are no more expensive than traditional academic high school programs, meaning that their CTE Education Amount would be the same as the CEA. Other programs—particularly those that require specialized facilities, materials, or staff—are more expensive and would have a higher CTE Education Amount. We recommend that the CTE Board of Trustees with guidance from RIDE, reevaluate program costs every 5 years to determine the program-specific CTE Education Amounts. Funding

for students participating in CTE programs would follow them, from their home district to any out-of-district placement—regardless of the placement district—ensuring equity. The current system means that some students come with more funding than others. To prevent this issue, the Commission recommends a modestly revised approach. Each sending district would send their minimum required per-pupil local contribution to the placement district, applying any relevant student-specific weights (e.g., economically disadvantaged, MLL, students with disabilities), regardless of the student's CTE program. The state would provide the difference up to the CTE Instruction Amount for that specific program and for that individual student. In other words, the receiving district would get the CEA for a student, the additional funding that comes with any individual student weights, and (if applicable) the increment for the specific CTE program the student enrolls in. This approach would equalize tuition rates across sending and receiving districts. Note that it would also apply to students who enroll in a higher-cost CTE program in their own district.

Charter Schools

The Commission does not take a stance on the value of charter schools in the state's public education system. However, if these options exist, students attending them should be treated equitably. The current system results in large inequities in several areas (e.g., special education, transportation, pensions, facilities), sometimes to the detriment of one type of school system and other times to the detriment of the other. Workarounds, like holdbacks for charter schools, have been instituted to counteract these fundamental inequities. The result has been a complicated, obscure, and unpredictable system that harms students attending both types of schools.

Our proposed revisions to the funding system address nearly all these fundamental challenges in other ways:

- Our recommended changes to student weights are designed to provide districts equitable resources based on the populations they serve. In particular, the proposed changes to funding for special education students are critical. By applying a student-centered approach, we help to ensure that one type of school system does not take on a greater cost of educating students with disabilities without corresponding resources. The recommendation that the state assume costs for high-cost special education also ensures that districts are not treated disproportionately.
- We have included the cost of in-district transportation in the proposed CEA. Like traditional public school districts, the cost incurred by charter schools to transport students to school is now accounted for in the proposed funding system.
- We recommend that all districts – traditional public school districts and charter schools – are only responsible for the retirement costs associated with their current teachers.

These measures remove many of the most significant differences in costs between traditional public school districts and charter schools. Given these changes, we recommend an end to the use of holdbacks when funding students who attend charter schools. The current system of utilizing prior year expenditures to correct for differential costs creates precarious budgeting for all districts and threatens programs and services for students in both traditional public school districts and charter schools. Rather than mitigate these inequities after the fact, we have

attempted, in each area, to create a more equitable funding system. These changes ensure that dollars can follow students according to their instructional needs. Again, we think the state should adjudicate elsewhere whether to support charter schools or not. If charter schools exist, our student-centered principles suggest that all public school students in the state should have equal access to resources.

Housing Aid

A major source of funding for educational expenditures in the state comes in the form of housing aid, which provides funds to support new capital projects. In 2024, the state approved \$1.3 billion in school construction, \$613 million of which municipalities will cover^{xi}. The Commission did not address housing aid in detail given that this is a complex system and not directly related to instructional costs. However, ensuring that all students are taught in buildings that support their learning is an important educational goal for the state.

The Commission's primary recommendation in this regard is that charter schools have equal access to state funds used to build and maintain facilities and to finance the costs of past building projects. School housing aid for charters should reflect that of the sending district. If 100% of a charter's students come from one district, then the charter's school housing aid should be equal to that of the sending district. If their students come from more than one district, the housing aid should be proportional to enrollment from each sending district.

This recommendation has implications for housing aid more broadly. Expanding the set of districts that can access equitable housing aid without increasing the total aid means that the existing funds will be spread thinner. Instead, the Commission recommends that the state increase housing aid

available to provide all districts access to the same level of support they currently enjoy and not create unnecessary competition between districts for housing aid.

03 Required Local Contributions

Defining a Municipality's Ability to Pay

As is standard in other states, we recommend that Rhode Island base the required local contribution on a measure of local fiscal capacity. We recommend specifically that the level of required local contribution should be driven by the assessed value of residential and commercial property in the district, calculated using a local share determination rate. Municipalities can continue to set their own tax rates, determine hardship exemptions for economically disadvantaged families, and have different rates for homeowners, landlords, and second homeowners, so long as their policies generate revenue at least equal to the required local contribution each year.

The current system uses a quadratic mean that balances assessed value with the share of children living in poverty. The Commission decided to base the local contribution on property tax assessment alone and not factor in household income or poverty level for several reasons. First, if property taxes are supporting the local contribution, assessments should directly reflect the community's ability to pay. Second, we recommend shifting more burden to state income taxes. Family income factors into income taxes, which support the state share. Third, the SSF weights account for the role of student poverty in affecting the cost of education. Finally, this approach is more equitable and transparent than the existing approach.

We considered moving away from any local contribution and shifting all funding

to a state income tax, as happens in several other states. However, we did not for two reasons. First, property taxes ensure stability in funding, particularly during recessions, as they are less variable than income taxes. Second, having at least some local contribution ensures local control and provides a mechanism for communities to fund their public schools over the foundation amount.

The Commission proposes that the minimum local contribution requirements would apply to ALL students living in the given municipality, regardless of what school they attend. If the municipality did not meet these requirements for any district, the state could take action to reduce state funding for all students in the municipality, not just those going to the underfunded district. In other words, the municipality must provide the required minimum local contribution to charter schools, CTE programs, or other placements outside of the local district. It cannot attempt to underfund some students but not others. Note that municipalities may decide to spend more than the minimum in a variety of ways—via categorical funds for specific purposes, for certain types of schools, and so on. If the municipality decides to spend more than the minimum amount on certain schools, it need not fund other students at that same level.

As with CTE, we recommend that state funds for students attending charter schools be paid directly to the district that the student attends (i.e., to the charter school itself). Municipalities, not traditional public school districts, would also make direct payments of the local share to the receiving charter school. This change would eliminate the confusing current practice of charter school dollars flowing from municipalities to charter schools through traditional public school districts. As a result, district budgets and spending would directly reflect actual district enrollment.

What if municipalities do not meet their local share requirement?

The Commission recommends that municipalities that do not contribute their required local share will receive reduced state funding for education. The Commission also recommends that the state establish a hardship appeals process to account for unforeseeable circumstances shifting local revenues.

The Commission considered several alternatives here. In some places, like Alabama, the state has authority to withhold all state funds for education if local contributions are not met. Other states reduce funding in proportion to the underpayment. The Commission sees advantages and limitations of each approach. Withholding all state funds provides a strong incentive, but it could end up hurting students and educators, and may be difficult to do in practice. A proportional reduction could be gamed by municipalities. There is no ideal solution here. In the end, the Commission recommends the approach taken by Connecticut, which reduces state funding automatically by double the amount that the municipality underspends. In other words, if the municipality contributes 5% less than it should, the state will contribute 10% less.

Maintenance of Effort

The current formula includes complex MOE requirements. On the one hand, MOE provides some predictability in local funding. However, with a required local contribution requirement, as this Commission recommends, any district spending at the state minimum will automatically need to meet this. Thus, the MOE provision would only bind for districts that spend more than they are required to. And, as we have heard across the state, having an MOE provision for districts that choose to spend more can provide a real disincentive to do so—if they invest more one year, they are then locked in. Thus, the Commis-

sion recommends doing away with MOE provisions (as they are largely captured by a required minimum local contribution).

Hardship Appeals

One core principle of the Commission's recommendations is that funding should be predictable yet flexible. The state should create an appeals system to provide municipalities and districts flexibility when unforeseen circumstances arise. The Commission recommends building a strategic reserve to support these appeals. We should be clear – the Commission anticipates that such appeals will be rare and infrequent, only being pursued and approved in cases of substantial challenges that cannot be anticipated.

There are two potential types of hardships for unforeseen circumstances. First, municipalities should have the ability to appeal for hardship based on the local contribution requirements. For example, if a municipality faces a substantial shift in its tax base that is not reflected in property values or has an unforeseen shock to local expenditures, they should be able to appeal their local contribution requirement. In such cases, the municipality can receive an adjustment to the required local contribution. These appeals should only be granted in cases that are truly unforeseeable. For example, appeals because of steady population declines or tax incentives should not be approved.

Second, the state should establish a fund to support shocks to instructional costs that districts might face. For example, if student populations shift substantially after the October Average Daily Membership calculation, the district may face substantial additional instructional costs. The state should provide funding to support the district in that year rather than waiting until the following year.

04 Financial Responsibility, Reporting, and Strategic Management

What is Fiscal Responsibility?

We use the term fiscal responsibility to mean that a district uses its funding legally, efficiently, and effectively.

Legal

A fundamental requirement is that districts spend dollars in legal ways free of malfeasance and abuse. This includes ensuring that funds for specific groups of students (e.g., MLLs or economically disadvantaged students) are used for their intended purposes.

Efficient

Districts are also expected to spend dollars efficiently, meaning that they minimize costs by aligning spending with their intended outcomes and realities. For example, declining enrollments highlight the need for efficiencies of scale that may come from closing school buildings or consolidating regional services (e.g., for high-cost special education or health insurance purchasing). A system to ensure fiscal responsibility should take these considerations into account, asking questions about districts' decisions to operate very small schools or not to seek out regional efficiencies. Districts may make different instructional decisions for how to use their dollars, but in each case public dollars should be spent as efficiently as possible.

Effective

Finally, the system should assess whether public dollars are translating into student outcomes. The state's school accountability system can provide a baseline. However, we recommend additional measures such as more comprehensive school quality reviews to inform this system. Here, states like Massachusetts, Maryland, and California have models, including

opportunities for community-based input. Such efforts would require additional funds but can provide important information to support fiscal responsibility and strategic management.

The Commission notes that there are two primary ways to assess fiscal responsibility, focusing on inputs or focusing on outcomes.

In input-based systems, policymakers specify the uses of dollars and hold districts responsible for using those dollars according to these specifications. Note that input-based requirements could be broad (e.g., 80% of dollars need to be spent at the school level) or narrow (e.g., every district must spend \$5,000 per teacher on professional development). Some input-based requirements related to spending are inherent in federal and state policy. For example, schools must provide specific special education services to eligible students and trained teachers to MLLs. In the extreme, state policymakers could fully control how local dollars are used. Such systems provide assurance that public funds are being used in certain ways but often limit local control over use of dollars to meet the needs of students.

In outcomes-based systems, policymakers articulate a set of outcome goals and provide funding to achieve these goals, but they give districts flexibility in how these dollars are spent. Note that these outcomes could (and should) go beyond student test scores. Pure outcomes-based systems have no strings attached to dollars (other than those required by federal law) and give districts pure autonomy to spend public funds as they want. Districts are then held accountable for whether they are meeting their goals. Such systems provide opportunities for local flexibility and innovation to meet student needs, but they give the state more limited control over spending. Evidence suggests that when school leaders are allowed to decide how money is

spent, they are better able to drive improvement.

Neither of these approaches, in their extreme, is likely fully satisfactory for Rhode Island’s goals. At the broadest level, we recommend a combination of both.

Tiered System of Support

The Commission envisions a tiered system of support for districts, similar to those used in California and other states.

First, districts that the new independent state Fiscal Responsibility Board flags as needing additional support will be required to consult with RIDE as part of the budgeting process and receive additional technical assistance related to financial planning and management. For example, the Board may require quarterly meetings and ask the district to develop a plan to address areas of need. This plan will be posted publicly. RIDE will provide support as needed. The Board and RIDE’s Office of School and District Improvement will need to align on best practices here to ensure consistent feedback and guidance. These processes should be collaborative, seeking to identify root causes of the issues the Board surfaces and identify solutions.

Second, if the identified challenges do not improve, the Board will then work with the district to co-develop a plan to align spending with instructional needs. For example, if a district is struggling with outcomes for multilingual learners, the Board can assert more control, requiring a jointly developed plan to allocate resources and support to these students or a locally developed plan that the Board approves. The Board and the district can then monitor whether these strategies are paying off. Other states such as California have used such systems effectively, although they will require additional state-level capacity. At both of these stages,

public plans and transparency can support additional public and municipal engagement.

Finally, for districts that continue to be flagged as not meeting goals, the Board can provide additional required guidance about spending. In other words, for districts that do not meet outcomes-based goals, the state can provide additional input-based requirements. This guidance could include, for example, that the district strategically reallocates funding to provide significantly more dollars to specific schools or student populations, that it reallocates dollars to specific instructional efforts (which could require personnel changes), or that it engages in financial planning and monitoring in different ways. This step would be rare but would essentially provide an intermediate step before takeover, allowing the state to provide additional oversight in specific areas without taking away local control.

As operationalized in state law, the state continues to have the opportunity to take over local districts and/or fail to reauthorize charter schools for ongoing performance or financial management issues.

Here, we provide two stylized examples.

Imagine that a district struggles with problematic student behaviors. These culture/safety issues are flagged as part of the school accountability system.

- In initial conversations, the Board will ask the district to develop a plan to address these challenges. RIDE will provide support in developing this plan. The local school committee could do the same. This plan will not just include practice-based strategies but will articulate how dollars are being spent to address the challenge. The plan will be public, and transparent data will allow local officials and the broader public to monitor progress.

- If the culture/safety issues do not improve, the Board can assert more control, requiring a jointly developed plan or a locally developed plan that the Board approves as well as ongoing monitoring. These plans may include pushing the district to make specific trade-offs (e.g., investing more in social workers and less in other areas).

- Finally, if the issues continue to be problematic, either because the plans are insufficient or are not implemented well, the Board can choose to exert more control, for example mandating that the district fund specific trainings for all staff or that they have school staff regularly in the hallways during transition times.

A second example relates to financial management. Imagine that a district fails to produce budgets that spend their resources. For example, during the pandemic, a few districts in the state left substantial pandemic relief funds on the table because they could not spend these dollars. Ideally, municipalities will engage in oversight and support here as well, but the state would also be involved given state funding.

Here, for example:

- First, the Board will ask the district to meet quarterly and produce revenue and expenditure projections. It will provide guidance and support on budgeting, as needed, and ask the district to develop a plan to address these challenges. The plan will be public, and transparent data will allow local officials and the broader public to monitor progress.
- If the budgetary issues continue and the district continues to have challenges with financial management, the Board can assert more control, requiring a jointly developed plan or a locally developed

plan that the Board approves as well as ongoing monitoring.

- Finally, if the issues continue to be problematic, the Board can choose to exert more control, for example by taking over financial management, requiring that the district hire an outside firm to do this work, or requiring that the district cede financial oversight to the municipality.

Putting It All Together: What the New System Means in Practice

Calculating the Core Education Amount

To calculate the proposed CEA, the Commission recommends that the state continue to use federal school finance data from the National Center for Education Statistics (NCES) to calculate a regional per pupil cost in Connecticut, Massachusetts, New Hampshire, and Rhode Island.

However, instead of using instructional expenditures (as is currently done), we recommend using current educational expenditures to capture the broader costs that districts must bear to educate their students. The proposed CEA is a regional per pupil cost, meaning that it is calculated by taking total current expenditures in the four states divided by the total number of students. This is important to note because of the differences in the size of the student population across these four states.

Because there is a two-year lag in NCES school finance data, the CEA should also be adjusted for inflation using the Bureau of Labor Statistics’ CPI-U (Consumer Price Index for Urban Consumers) in order to reflect changes in purchasing power. The two-year lag may mean that the CEA is sensitive to fiscal shocks—if negative fiscal shocks (e.g., cuts to federal education funding, cuts to Medicaid, etc.) necessitate

decreases in education spending, the proposed CEA may decrease.

Shared Educational Costs

As shown in Figure 1 in the previous section, educational costs fall into three main categories: those funded solely by the state, shared costs (primarily accounted for in the formula), and those borne solely by municipalities. Some of these costs outside of the current formula are clear—like in-district transportation or building maintenance. We recommend putting these into the proposed CEA.

We recommend transferring other costs—such as legacy pension costs, high-cost special education, early childhood screening, and out-of-district transportation—to the state, as described above.

The largest of these categories involves teacher retirement costs. In FY 2024, the costs for current and retired teachers under the state’s defined benefit system totaled \$314 million. Of this, \$273 million were for teachers who are already retired and \$41 million were for current teachers. Note that these figures do not include costs that districts pay for social security or for the defined contribution plan, which are included under “instructional costs.” Currently, the state pays 40% of the costs for the defined benefit system (\$127 million in FY 2024), while municipalities contribute 60% (\$187 million in the same fiscal year). Our proposal puts the full \$41 million for current teachers into the proposed CEA, and the full \$273 million for retired teachers as a state responsibility.

The impact of our proposal on other costs is less clear, although these are not key drivers of educational costs in the state. By taking responsibility for high-cost special education and out-of-district transportation, the state can likely lower costs by making these systems more efficient. State support for early childhood screening will likely increase

costs by expanding services, given that screening is currently quite limited in some communities. In the calculations in this section, we use FY 2024 data as an approximation for these costs.

Weighted Student Funding and the Adjustment Factor

For each student, the Commission recommends using a series of additive weights – a SSF of 50% for economically disadvantaged students and Instructional Program Weights (variable) for MLLs, students with disabilities, and students in high-cost CTE programs. For example, the instructional costs for an economically disadvantaged student who is also a multilingual learner at Proficiency Level 3 on the WIDA/ACCESS would be:

CEA x (1 + 0.5 + 0.4) = 1.9 x CEA

In the calculations in this section, we focus on economically disadvantaged students and MLLs, since the Commission proposes that other bodies determine the specific weights related to students with disabilities and students in high-cost CTE programs. Actual district funding levels will differ, in ways that are directly aligned to instructional costs.

For East Providence, for example, the district’s 4,966 students imply an initial foundation amount of \$110 million given the proposed CEA of \$22,093. 1,902 (or 38%) of the students were identified as economically disadvantaged. The district had 311 multilingual learners (6%), with varying levels of proficiency. Adding in these factor adjustments provides a total foundation cost of \$133 million.

Adding this up across all districts, though, suggests that the average per-pupil current expenditures in Rhode Island would be \$28,178. So, these calculations need to be adjusted. The adjustment factor of 78.4% means that the adjusted foundation cost per pupil equals the regional average of \$22,093 per pupil.

Note that the adjustment factor is simply a mathematical value that depends on the characteristics of students in the state. It is not intended as a place for policymakers to intervene to change the cost of the proposed system.

For East Providence, then, applying the adjustment factor of 78.4% suggests an adjusted foundation cost of \$105 million. This is substantially higher than the foundation cost in the current formula (\$77 million) because the new foundation amount includes many more types of expenses as shared costs.

Adjusting State Expenditures

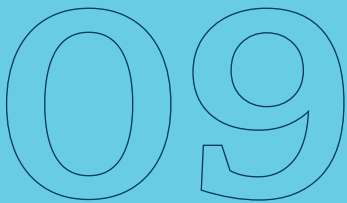
In our proposal, the state legislature can readily set its budget by changing the state share of educational expenditures. A smaller Total State Share means that municipalities will have to bear more educational costs.

However, there are many reasons why the legislature might also want to adjust the statewide minimum required educational costs. As described above, the state might want to invest in education more than regional peers. It might also want to cut the state budget but not put additional fiscal burden on municipalities. In these cases, we strongly recommend that the state simply adjust the total level of expenditures rather than adjust specific components within the formula.

Phase In

The Commission recognizes that any new funding system cannot be introduced overnight. There will need to be some time to phase in the new funding system and other changes. The instinct, however, is often to roll out changes over such a long time horizon that budgetary shifts are very gradual and the system does not take effect for many years. The Commission recommends balancing deliberate progress to ensure stability with expediency to

introduce a new, more equitable funding system quickly. With sufficient planning, we expect that parts of the proposed funding system can be adopted quite quickly, and the full system might be in place within three to five years.



Endnotes

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