Virginia's Triennial Census

A preliminary study of process, accuracy, and options

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Overview

- Background
- Issues
- Analysis
- Options
- Conclusions

Background

- School divisions conduct triennial census of **all** 5-19 year olds residing in the district
- Counts determine appropriation of state sales and use tax for public education
- VDOE provides guidelines to school divisions, but the planning and execution are left to local school boards

Background

School divisions must:

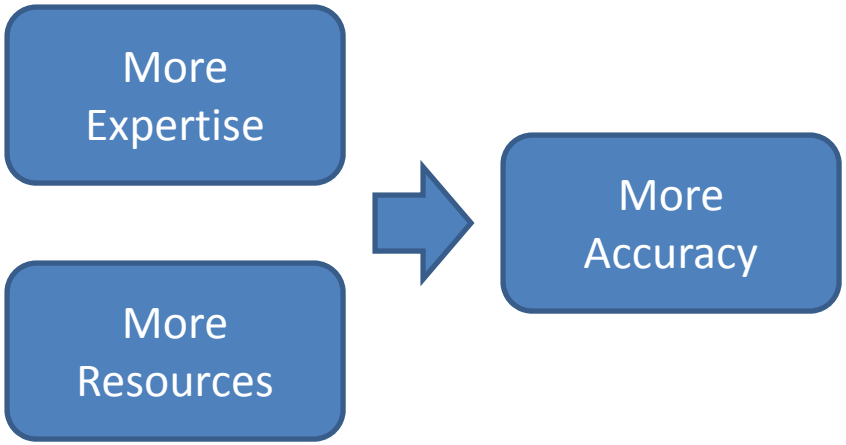
- Appoint census director
- Prepare budget
- Develop schedule
- Plan method for conducting census
- Conduct census
- Tabulate census counts
- Follow-up on nonrespondents
- Evaluate data
- Report count to VDOE

Issues with Triennial Census

- Developing a list of where all children may be living is very challenging
- Contacting and getting responses from all households is extremely costly and difficult
- School divisions have widely varying:
  - Funds to conduct census
  - Training for enumerators
  - Questionnaires
  - Methodologies for collecting data
  - Response rates

Issues with Triennial Census

- Overall, triennial census suffers from lack of centralized and uniform procedures for conducting the operation
- Major differences in expertise and resources exist between school divisions



Analysis

- Compared 2005 triennial census counts to 2005 Cooper Center population estimates
- Computed over- and undercount of 5-19 year olds in triennial census
- Theoretically, an accurate count in each locality results in every school division receiving an equal dollar amount per child.

Analysis

When counts are inaccurate, the amount of tax money received per child is not the same for all localities.

Overcoverage

Triennial Census Count > *Cooper Center Estimate*

↓

Too much tax money allocated to locality

↓

Actual Share of Tax Money per Child > *Equal Share of Tax Money per Child*

Undercoverage

Triennial Census Count < *Cooper Center Estimate*

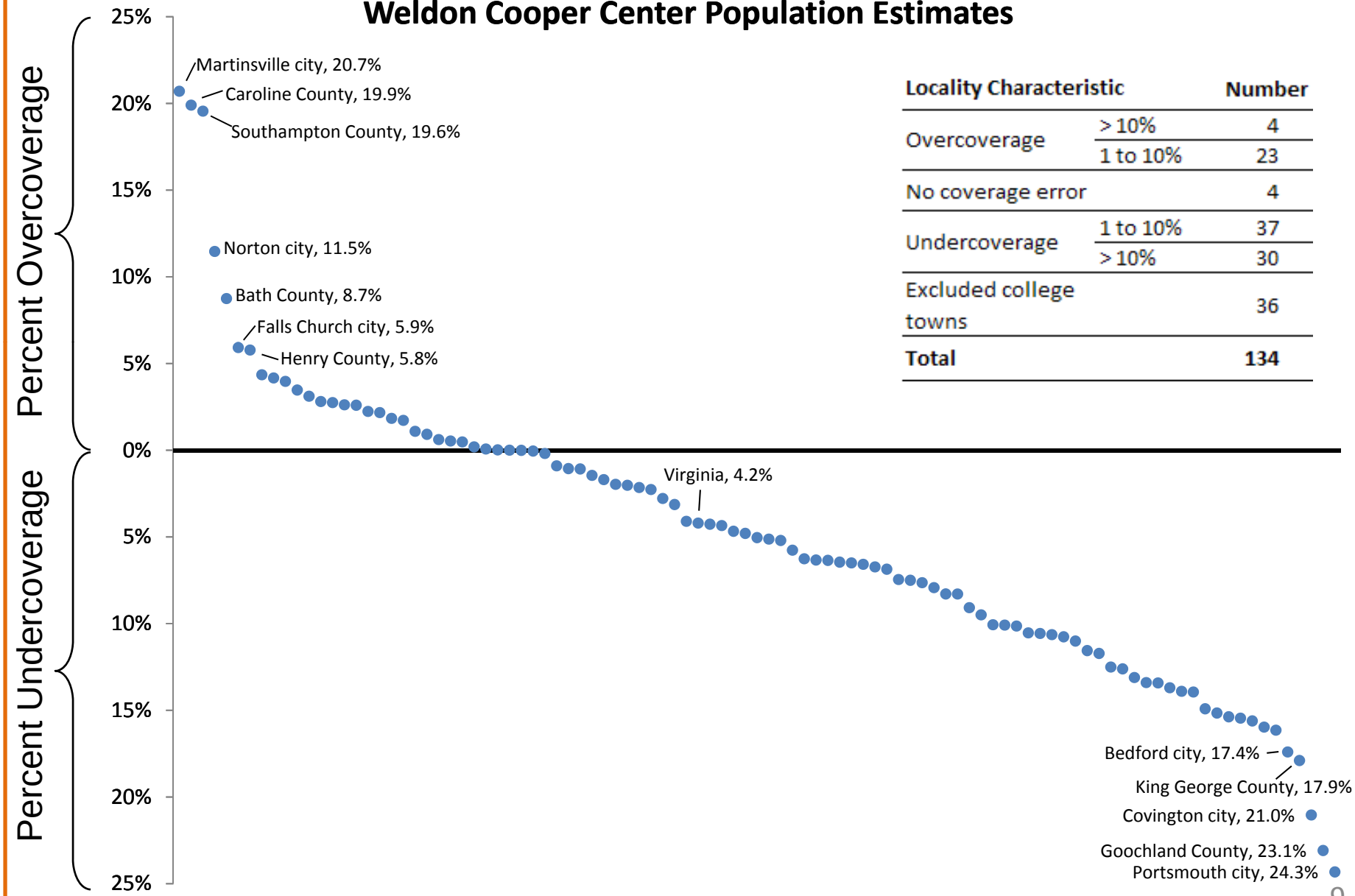
↓

Too little tax money allocated to locality

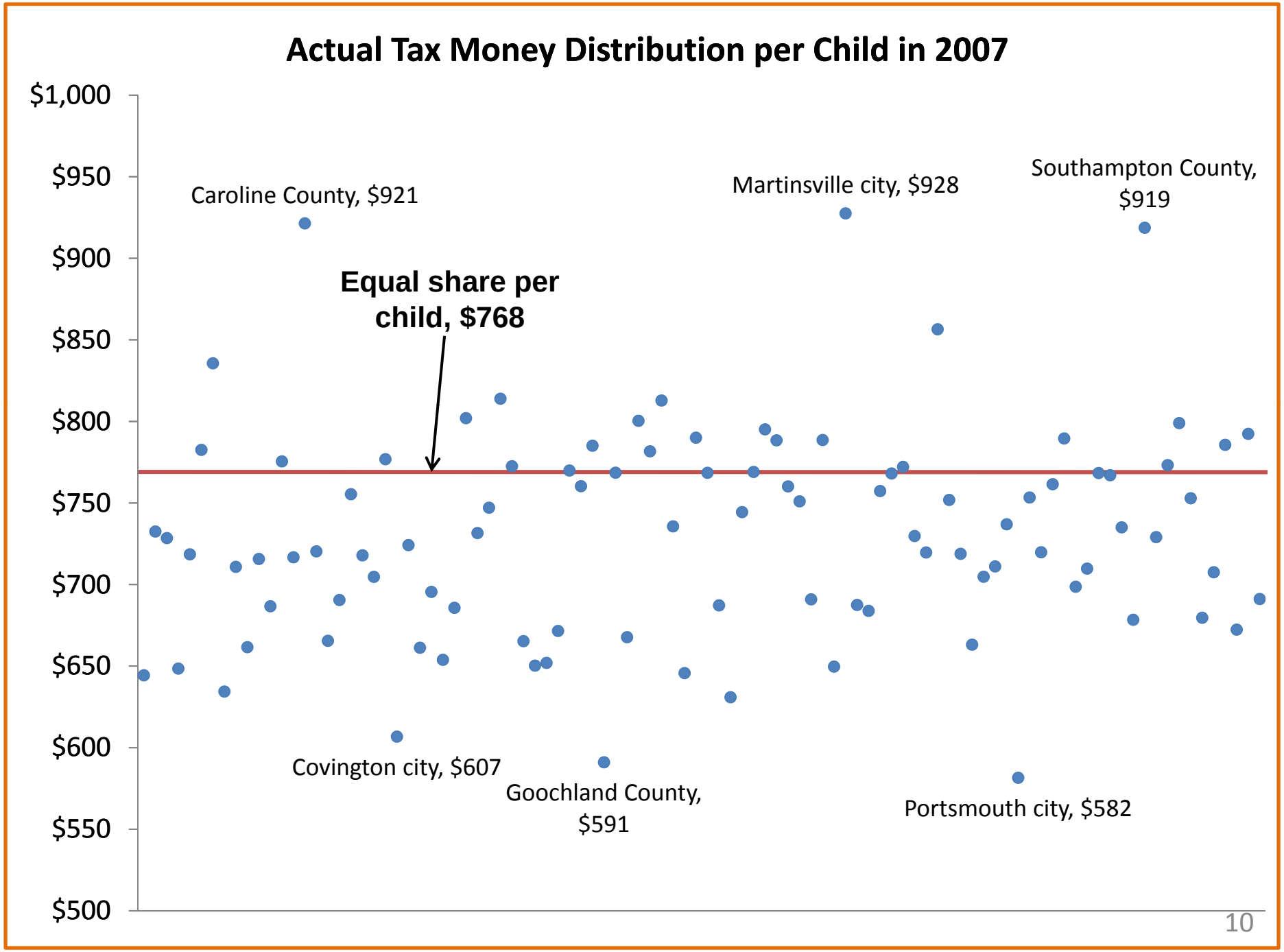
↓

Actual Share of Tax Money per Child < *Equal Share of Tax Money per Child*

Triennial Census 2005 Coverage Error when compared to Weldon Cooper Center Population Estimates



Locality Characteristic		Number
Overcoverage	> 10%	4
	1 to 10%	23
No coverage error		4
Undercoverage	1 to 10%	37
	> 10%	30
Excluded college towns		36
Total		**134**


Actual Tax Money Distribution per Child in 2007
$1,000
$950
$900
$850
$800
$750
$700
$650
$600
$550
$500
Caroline County, $921
Equal share per child, $768
Martinsville city, $928
Southampton County, $919
Covington city, $607
Goochland County, $591
Portsmouth city, $582

Analysis

Triennial Census results in:

- Burden of time and resources
- Inaccurate counts, with level of inaccuracy varying across districts
- Coverage error, which has significant fiscal impact
- Unequal shares of tax money per child

Triennial Census should be replaced with a method that provides consistent, fair allocation of funds throughout the Commonwealth

Option 1
Average Daily Membership

- Consistent
- Already collected annually
- High quality data

Constitutes a fundamental change to funding allocations: private school/homeschooled children would no longer be included in this portion of the funding formula

Option 2
Cooper Center Population Estimates

- Consistent
- Can be produced annually
- High quality data

No fundamental change to funding allocations: private school/homeschooled children would still be included in this portion of the funding formula

Conclusions

- Current method is inadequate, inconsistent, unfair, and necessitates a change
- Any change will cause shifts in funding shares, but change is necessary to achieve fair fund allocation
- Switch to ADM provides fair, consistent methodology, but also constitutes a fundamental shift in funding formula

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Analysis

- Inaccurate triennial census counts have a dramatic effect on the amount of tax money distributed per child
- Theoretically, an accurate count in each locality results in every school division receiving an equal dollar amount per child.

$$\text{Equal share of tax money for each child} = \frac{\text{Tax Distribution for Virginia}}{\text{Triennial Census Count for Virginia}}$$

Tax Form Data

Use VA state tax forms to collect annual population totals for children age 5-19.

Pros

- Easy to implement, requiring simple addition to state tax form
- Data used for tax distribution is more current
- School divisions would not need to use resources to conduct a census

Cons

- Incomplete coverage
- Low filing rates for some population groups

Population Estimates

Appoint Weldon Cooper Center to provide annual estimates of school-age population.

- Cooper Center has expertise, experience, and techniques to provide annual estimates
- Consistent, timely, reliable results for a fraction of the current costs
- Distribution of tax money would actually be proportional to the number of students living in each locality