

What are Basic Aid districts?

by Jeff Camp | February 3, 2024 | 0 Comments (#comments)



Overflowing funds for schools?

As we've written regularly, California's public schools are not generally overflowing with resources. Their cup does not run over. Oddly, though, overflowing is actually part of the design of the school finance system system.

Virtually all K-12 public school students in California attend a school funded by a mix of (mostly) state income taxes and (some) local

property taxes. This mixed-source funding system, the Local Control Funding Formula (LCFF (/lessons/lcff)), serves about 96% of the students in the state.

Phased in from 2013-14 through 2018-19, LCFF replaced a complex and unfair school funding system with one designed for fairness and flexibility. The LCFF system is widely recognized as rational,

About 4% of California students attend a school in a Basic Aid district. Here's how that works.

explainable, and, well, good policy (https://learningpolicyinstitute.org/product/school-

funding-effectiveness-ca-lcff-report). Among other things, LCFF eliminated a bunch of regulation-heavy state programs, and empowered school districts to make more of the decisions about how to spend the money entrusted to them.

In 2022-23, just 3.7% of California's public school students attended a school that is *not* part of the LCFF system. *Basic Aid* districts (also sometimes called *Community Funded* or *Excess Tax* districts) are the exceptions in the LCFF system. In these districts, the revenue from local property taxes is greater than the minimum guaranteed on a per-student basis through the LCFF calculation. In principle, these districts are self-funded, and *might* receive only a minimal amount of funding from the state — thus the term *Basic Aid*.

Did you notice the word *might* in the sentence above? Hmm. I'll come back to it. Fair warning: this post spelunks some deep policy junk. I'll

Did you notice wiggle words in the sentences above? Hmm. I'll come back to them.

do my best to get it right based on the data I have. (If I make mistakes, please contact me. This stuff is hard to get right!)

The point of this post is to demystify the Basic Aid system

as a way of helping to understand what LCFF does and why it matters so much. It's also interesting as a case study of how change actually happens, complete with the power plays and tradeoffs sometimes involved in getting to yes.

How does LCFF fund school districts?

You can't appreciate LCFF without at least a little bit of context, so here's some high-speed background. (Leans back, stretches.) OK, here goes:

The school funding systems that came before LCFF started out breathtakingly unequal, but got better over decades of change.

1960s:

In the 1960s and earlier, California public schools were funded almost entirely locally, using local taxes on local property wealth. This was deeply unfair, because the value of taxable property varied wildly from one school district to another. Low-income neighborhood with a low tax base? Sorry, kids. Better luck next decade.

1970s:

In the 1970s the system *did* change, and in a big way. Responding to massive inequity in school funding, the courts blew up the school funding system, Robin Hood-style. A system of court-ordered *revenue limits* (https://www.ppic.org/publication/funding-california-schools-the-revenue-limit-system/) redistributed wealth and sparked political fire. It was only a matter of time before...

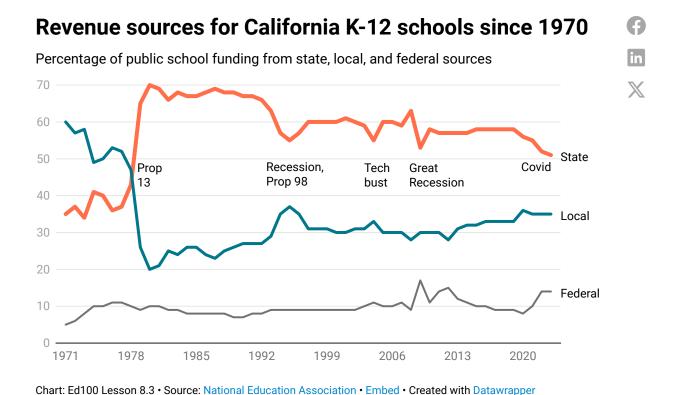
1980s:

...yep, voters blew up the funding system again in 1978 by passing Proposition 13 (/lessons/prop13), which slashed property taxes. This sent school funding in California into a tailspin, so it was only a matter of time before...

1990s:

...voters intervened again by passing Proposition 98. It took form in the 1990s. Prop 98 established in the state constitution a minimum level for education spending when local and state spending is considered together. It's ugly, but it rescued public education and we still rely on it.

In combination, these voter measures inverted the tax system, swapping property taxes with state income taxes as the main source of school funding.



To be clear, the system that emerged in the '90s worked, but it was a Frankenstein monster. Features of the system included revenue limits (https://www.ppic.org/publication/funding-california-schools-the-revenue-limit-system/), categorical programs, precedents, line items, exceptions and plenty of special deals. Reform-minded people hoped it might just be a matter of time

2010S:

before...

...a crisis brought a chance to make a more purposeful system. The Great Recession trashed education funding and delivered the opportunity of a long-needed crisis. Partly responding to good advice from a nonpartisan expert panel (the Governor's Committee on Education Excellence (/blog/EdExcellence)) the legislature blew up the system (/lessons/change) again in 2012 — in a good way. In place of the old system,

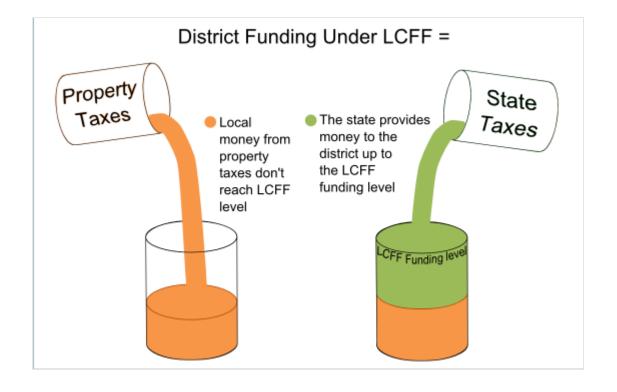
California leaders instituted LCFF, a much more rational and fair education finance system assembled with far *fewer* sloppy sutures and neck bolts.

Only a few, in fact. (Yes, yes, be patient. We'll get there, I promise.)

Um, what does LCFF do, again?

Here's a *simplified* bucket metaphor for the Local Control Funding Formula system.

- 1. The state budget gives your district a bucket of LCFF revenue that's just the right LCFF size for your LCFF district.
- 2. Local property taxpayers pour in property taxes, partly filling your LCFF bucket. (37% for the average district in 2022.)
- 3. The state adds state taxes until your LCFF bucket is full to the brim, like this:



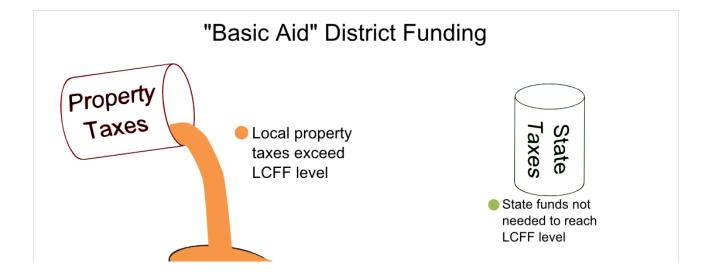
Does this look too simple? Of course it does. Let's fix that a little but stay with the metaphor. Time for some fine print:

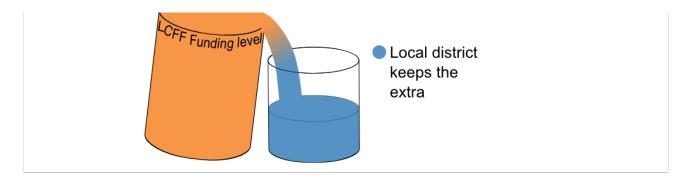
- The size of your district's LCFF bucket is a factor of the state budget.
- Your bucket is a little bigger to the extent that you have more kids in higher grades.
- Also to the extent that you have students in poverty, learning English, homeless, or in foster care.
- Also the bucket is sized up if you have lots of kids with any of these attributes
 but don't count 'em twice.
- Oh, and funds evaporate from the bucket to the extent kids don't *attend* school they only count when they show up.

But this is a metaphor, and it's *simplified*, remember? The big point is that as an LCFF district, what matters is the size of your LCFF bucket, *not* the mix of funding sources that fill it. State? Local? Doesn't matter — dollars are dollars.

What's different about funding in a Basic Aid district?

Continuing with the metaphor, Basic Aid districts have a standard LCFF-sized bucket, but they have more than enough local revenue to fill it themselves, without state help.





The local property taxes collected for K-12 at a Basic Aid district would overflow an LCFF-sized bucket, so basic aid districts have their own buckets to keep the extra. Local property tax dollars at a Basic Aid district stay local, even when they exceed the LCFF level.

Remember all the fine print about how LCFF districts get a little extra money for this and that, but only if kids show up for nose count, etc? None of that matters at a Basic Aid district. The budget for a Basic Aid district is determined by how much property tax comes in. That's pretty much it, mostly. (Notice the wiggle words? Stay with me.)

Being a student in a Basic Aid district is generally a good thing for students but not *automatically* so. Some Basic Aid school districts bring in property taxes at a level that puts them only marginally or intermittently over the LCFF line, so it's not like they are definitely getting a bunch of extra money. In a downturn, these districts worry, with reason, whether they would receive emergency support from the state or federal government. They tend to be extra careful about saving adequate rainy-day reserves locally. Many Basic Aid school districts are located in the most expensive areas of the state, so they are not without fiscal challenges.

And yet. Some schools in Basic Aid districts have money other school

communities can only dream of. Some of them have even more than that... if they also get *Minimum State Aid*. (You have now arrived at the heart of the mystery.)

What is Minimum State Aid (MSA)?

The LCFF system wasn't born like Minerva, fully-formed and shining like justice. It is a surprisingly decent outcome of messy political processes. The bad old system (https://www.ppic.org/wp-content/uploads/content/pubs/report/R_913MWR.pdf) that preceded it (Revenue Limits, Categorical Funds and backroom deals) wasn't equally bad for everyone. For some districts it was pretty good, actually, so why would their representatives vote to change it?

A spoonful of sugar called Minimum State Aid (MSA) made the medicine go down.

A deal's a deal, right?

With the help of advisors including Mike Kirst (https://mikekirstbiographyproject.com/). Governor Brown negotiated a s

mikekirstbiographyproject.com/), Governor Brown negotiated a set of financial agreements to protect districts that stood to lose out in the transition to LCFF. Minimum State Aid was a mechanism to get that done. By agreeing to support LCFF, some legislators secured promises for ongoing state aid for their constituents' schools. The commitments are still in place. Hey, a deal's a deal, right? In 2022-23, minimum state aid commitments to school districts totaled about \$125 million.

Where does the extra money go?

The map below shows all of the unified (K-12) school districts that receive Basic Aid and/or Minimum State Aid. Most are located in the Bay Area, in coastal counties or in the Sierras. This pattern has been stable for decades. A map of the state's Elementary districts or High School districts would show a similar pattern. (Hover or click for details.)

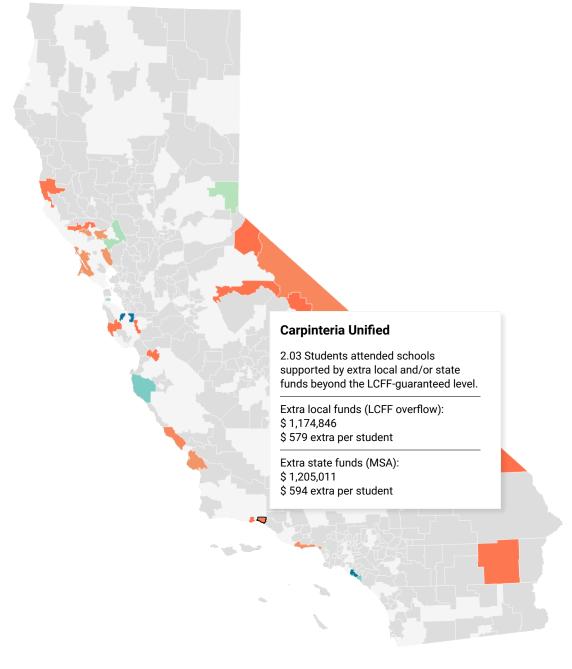
Which Unified School Districts received extra support beyond LCFF in 2022-23?





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Most school districts are part of the Local Control Funding Formula system. About 3.7% of California students attend schools in districts that aren't part of it. This map shows unified districts that received extra funds through local property taxes and/or state aid arrangements (MSA). Most of these are Basic Aid districts. Hover, click or tap for details.



Map: Ed100 Lesson 8.5 • Source: CDE • Get the data • Embed • Created with Datawrapper

The map effectively shows *which* unified districts receive money, but doesn't make it very obvious just how significantly some of the school districts in the Silicon Valley benefit from the extra local and state funds. Basic Aid schools in the high-cost Santa Clara and San Mateo Counties receive thousands of dollars of extra funds this way.

Collectively, they serve more than 100,000 students.

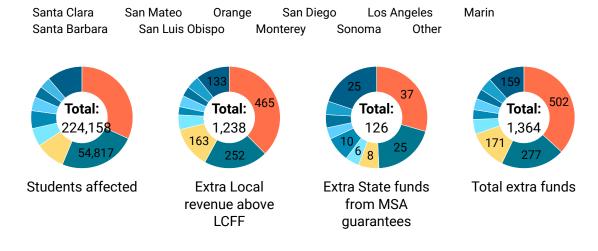
Beyond LCFF guarantee, most extra local and state money supports districts in Silicon Valley





In 2022-23, districts in Santa Clara County and San Mateo County, in combination, accounted for more than half of extra local funding to school districts beyond the level of the Local Control Funding Formula (LCFF). Many of the same districts received a majority of "Minimum State Aid" funds.





Dollar figures in \$millions

Chart: Ed100 Lesson 8.5 • Source: CDE • Get the data • Embed • Created with Datawrapper

About two-fifths of the students who benefit from either or both kinds of extra aid are in unified school districts.

District type	Students (ADA)	Districts	Local extra funding	Local extra per student	State extra funds (MSA excl. COEs)	State extra per student (MSA excl. COEs)
Elementary	76,487	70	328,470,002	4,294	56,744,650	814
Unified	94,004	30	603,105,494	6,416	56,744,650	951
High School	53,666	12	306,272,897	5,707	19,740796	651

Total 224,157 112 1,237,848,393 5,522 125,782,845 832

Should the system change?

Some will look at this data and feel jealous of the districts that have more money for their education system. Certainly, the system of MSAs is the outcome of politically-negotiated deals. But that's not the point of this post.

The LCFF system is an astonishing achievement of public policy, accomplished in the real world. It works very well for most of what we ask of it. Anyway, clawing funds away from places where they are being used to educate kids seems a waste of indignation.

Colleges can be Basic Aid, too.

Similar to public K-12 school districts, most public community college districts in California are funded by a blend of local taxes and state taxes. (The Student Centered Funding Formula, or SCFF (https://www.lao.ca.gov/Publications/Report/4695), strongly resembles LCFF.)

Also similar to K-12 and LCFF, some college districts receive enough local funding to be Basic Aid institutions. As of 2024, the Basic Aid public college districts (https://aft1493.org/explaining-basic-aid-orcommunity-supported-districts/) in the state strongly matched the self-funded K-12 districts: San Mateo, Marin, Mira Costa, South Orange, West Valley/Mission, San Jose/Evergreen, Napa Valley, San Luis Obispo County, and Sierra.

I grew up in the bad old days of

California education policy. The education finance system at that time was *bananas*. It was a murky mess so unfair that it was hard to feel good about putting more money into it. Today, we're in a much better place. When incremental money flows to public education in today's K-12 system, by design it goes toward need, not greed.

There's plenty of room for improvement in California's education system, but the basic finance system is sound. With more economic effort (/blog/education-and-economy) to invest in our state's schools, we could

reasonably expect good results.

California's basic aid districts and MSA recipients

In the table below, the "UD%" column shows the unduplicated percentage of students who are learning English, are from lower-income households, are homeless, or are in foster care. Statewide, 57% of students meet this definition. In Basic Aid and MSA recipient districts the rate is 32%, but it varies from 1% to 94%. If you want to go even deeper into the data, enjoy (https://docs.google.com/spreadsheets/d/

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California Ba	asic Aid distri	cts and Minimum	State Ai	d districts,	2022-23			
County	Туре	District	Sdts	UD%	Local extra \$	State extra MSA \$	Local extra \$ per student	Si exti stuc
Alameda	ELEM	Mountain House Elementary	20	74%	92,161	196,668	4,726	10,
Alpine	UNIFIED	Alpine County Unified	86	62%	275,084	476,520	3,202	5,
Butte	ELEM	Golden Feather Union Elementary	67	88%	85,628	361,499	1,283	5,4
Calaveras	ELEM	Vallecito Union	534	53%	1,754,842	628,691	3,285	1,
Calaveras	HIGH	Bret Harte Union High	591	38%	5,097,280	121,048	8,626	;

El Dorado	ELEM	Latrobe	154	13%	1,020,697	-	6,646	(
El Dorado	ELEM	Silver Fork Elementary	16	53%	89,238	183,846	5,574	11,
Fresno	ELEM	Big Creek Elementary	36	84%	387,502	212,212	10,681	5,
Fresno	ELEM	Pine Ridge Elementary	75	42%	1,020,990	121,244	13,690	1,(
Inyo	ELEM	Round Valley Joint Elementary	48	46%	597,152	97,223	12,548	2,
Inyo	UNIFIED	Big Pine Unified	148	64%	666,546	248,617	4,513	1,(
Inyo	UNIFIED	Lone Pine Unified	340	65%	673,110	445,343	1,981	1,
Inyo	UNIFIED	Owens Valley Unified	82	45%	641,535	28,793	7,821	;
Kern	ELEM	General Shafter Elementary	175	66%	635,929	152,886	3,634	+
Kern	ELEM	Linns Valley-Poso Flat Union	18	57%	135,930	65,262	7,637	3,(
Kern	ELEM	McKittrick Elementary	51	47%	1,967,701	184,477	38,432	3,(
Kern	ELEM	Midway Elementary	51	55%	575,475	95,884	11,375	1,
Los Angeles	UNIFIED	Beverly Hills Unified	3,264	21%	26,714,185	1,338,733	8,184	•

Los Angeles	UNIFIED	Santa Monica- Malibu Unified	9,459	28%	5,400,952	8,585,843	571	!
Marin	ELEM	Bolinas- Stinson Union	93	43%	2,827,080	229,708	30,514	2,
Marin	ELEM	Mill Valley Elementary	2,604	9%	1,287,739	1,736,292	494	1
Marin	ELEM	Nicasio	36	49%	298,791	39,589	8,360	1,
Marin	ELEM	Reed Union Elementary	1,165	7%	8,009,036	-	6,875	
Marin	ELEM	Ross Elementary	362	1%	2,369,647	185,455	6,552	!
Marin	ELEM	Sausalito Marin City	321	59%	3,984,538	815,163	12,421	2,
Marin	HIGH	Tamalpais Union High	4,893	11%	19,341,999	704,071	3,953	
Marin	UNIFIED	Shoreline Unified	370	63%	6,033,131	877,629	16,287	2,:
Mendocino	ELEM	Manchester Union Elementary	37	61%	205,854	72,102	5,550	1,!
Mendocino	HIGH	Point Arena Joint Union High	131	65%	2,315,256	326,425	17,721	2,
Mendocino	UNIFIED	Mendocino Unified	401	54%	1,161,698	1,556,031	2,899	3,

Mono	UNIFIED	Eastern Sierra Unified	393	53%	3,591,356	959,729	9,132	2,
Monterey	UNIFIED	Carmel Unified	2,299	19%	39,487,401	1,684,362	17,176	
Monterey	UNIFIED	Pacific Grove Unified	1,792	21%	11,983,330	2,505,456	6,687	1,:
Napa	ELEM	Howell Mountain Elementary	95	57%	614,415	54,770	6,437	1
Napa	ELEM	Pope Valley Union Elementary	51	84%	761,081	73,930	14,911	1,
Napa	UNIFIED	Calistoga Joint Unified	824	82%	6,776,722	508,956	8,228	(
Napa	UNIFIED	Saint Helena Unified	1,148	44%	23,465,062	481,492	20,442	•
Nevada	ELEM	Nevada City Elementary	638	33%	1,038,105	631,011	1,628	!
Orange	UNIFIED	Laguna Beach Unified	2,629	18%	38,545,395	548,204	14,663	1
Orange	UNIFIED	Newport- Mesa Unified	18,535	45%	124,718,168	7,634,726	6,729	,
Placer	UNIFIED	Tahoe- Truckee Unified	3,664	36%	20,711,853	1,906,330	5,652	+

Riverside	UNIFIED	Desert Center Unified	25	84%	1,199,773	120,493	47,838	4,
San Benito	ELEM	Willow Grove Union Elementary	16	94%	68,358	22,963	4,307	1,,
San Benito	UNIFIED	Aromas - San Juan Unified	937	59%	1,060,437	1,560,937	1,132	1,(
San Bernardino	ELEM	Cucamonga Elementary	2,331	71%	10,802,323	2,130,982	4,634	!
San Bernardino	UNIFIED	Baker Valley Unified	123	84%	115,931	182,560	939	1,
San Diego	ELEM	Cardiff Elementary	608	16%	4,381,838	386,643	7,204	1
San Diego	ELEM	Del Mar Union Elementary	3,933	19%	18,418,833	1,170,350	4,683	1
San Diego	ELEM	Encinitas Union Elementary	4,908	19%	8,827,772	1,840,774	1,799	;
San Diego	ELEM	Rancho Santa Fe Elementary	566	9%	5,671,672	157,463	10,014	;
San Diego	ELEM	Solana Beach Elementary	2,815	20%	20,282,502	1,663,990	7,205	!
San Diego	HIGH	Julian Union High	96	52%	457,033	347,758	4,750	3,

San Luis Obispo	ELEM	Cayucos Elementary	173	39%	1,651,296	133,560	9,558	·
San Luis Obispo	ELEM	Pleasant Valley Joint Union Elementary	54	36%	243,244	124,441	4,471	2,
San Luis Obispo	UNIFIED	Coast Unified	525	77%	3,663,493	623,045	6,984	1,
San Luis Obispo	UNIFIED	San Luis Coastal Unified	7,183	39%	6,015,215	3,029,242	837	•
San Mateo	ELEM	Belmont- Redwood Shores Elementary	4,043	16%	1,878,302	253,946	465	
San Mateo	ELEM	Brisbane Elementary	442	27%	4,664,344	182,688	10,544	
San Mateo	ELEM	Hillsborough City Elementary	1,235	4%	12,772,173	172,044	10,344	
San Mateo	ELEM	Las Lomitas Elementary	1,055	13%	14,157,348	264,400	13,414	1
San Mateo	ELEM	Menlo Park City Elementary	2,595	13%	15,133,234	432,027	5,832	
San Mateo	ELEM	Portola Valley Elementary	468	9%	9,662,831	146,571	20,657	,
San Mateo	ELEM	San Bruno Park Elementary	2,217	47%	2,013,375	553,758	908	;

San Mateo	ELEM	San Carlos Elementary	2,803	12%	356,008	1,575,946	127	
San Mateo	ELEM	San Mateo- Foster City	10,775	41%	6,452,223	7,821,366	599	
San Mateo	ELEM	Woodside Elementary	318	13%	6,255,152	165,217	19,670	!
San Mateo	HIGH	Jefferson Union High	3,946	37%	3,978,680	2,752,472	1,008	1
San Mateo	HIGH	San Mateo Union High	8,618	28%	71,203,302	3,705,980	8,262	•
San Mateo	HIGH	Sequoia Union High	8,253	32%	72,848,088	3,369,327	8,827	,
San Mateo	UNIFIED	La Honda- Pescadero Unified	274	58%	1,129,155	213,482	4,125	
San Mateo	UNIFIED	South San Francisco Unified	7,776	45%	29,490,038	3,356,626	3,793	•
Santa Barbara	ELEM	Ballard Elementary	134	10%	411,315	277,420	3,081	2,
Santa Barbara	ELEM	Cold Spring Elementary	185	5%	2,499,103	90,129	13,509	•
Santa Barbara	ELEM	College Elementary	169	60%	2,345,042	501,743	13,898	2,
Santa Barbara	ELEM	Goleta Union Elementary	3,415	41%	12,455,125	2,278,858	3,647	(
Santa Barbara	ELEM	Hope Elementary	864	35%	2,630,005	348,218	3,045	•

Santa Barbara	ELEM	Los Olivos Elementary	158	25%	319,857	247,660	2,022	1,
Santa Barbara	ELEM	Montecito Union Elementary	361	11%	12,149,289	181,307	33,692	!
Santa Barbara	ELEM	Vista del Mar Union	25	40%	587,775	133,020	23,502	5,
Santa Barbara	HIGH	Santa Ynez Valley Union High	846	26%	4,000,568	-	4,732	
Santa Barbara	UNIFIED	Carpinteria Unified	2,030	73%	1,174,846	1,205,011	579	!
Santa Clara	ELEM	Campbell Union	448	76%	13,399,741	7,403,399	29,890	16,
Santa Clara	ELEM	Lakeside Joint	69	20%	759,887	133,641	10,957	1,!
Santa Clara	ELEM	Loma Prieta Joint Union Elementary	452	10%	166,701	209,738	369	•
Santa Clara	ELEM	Los Altos Elementary	3,688	14%	13,123,844	654,207	3,558	
Santa Clara	ELEM	Los Gatos Union Elementary	2,754	9%	8,827,300	121,495	3,206	
Santa Clara	ELEM	Mountain View Whisman	4,736	35%	18,410,230	3,714,457	3,888	·
Santa Clara	ELEM	Orchard Elementary	788	58%	19,487	795,884	25	1,(

Santa Clara	ELEM	Saratoga Union Elementary	1,640	9%	18,250,617	324,666	11,132	
Santa Clara	ELEM	Sunnyvale	5,889	44%	32,299,438	2,907,954	5,485	•
Santa Clara	HIGH	Campbell Union High	8,371	36%	4,610,652	3,827,724	551	•
Santa Clara	HIGH	Fremont Union High	10,382	17%	51,481,750	1,455,766	4,959	
Santa Clara	HIGH	Los Gatos- Saratoga Union High	3,344	8%	20,325,848	150,691	6,079	
Santa Clara	HIGH	Mountain View-Los Altos Union High	4,196	16%	50,612,441	2,979,534	12,061	
Santa Clara	UNIFIED	Palo Alto Unified	10,339	17%	116,436,307	2,560,485	11,262	1
Santa Clara	UNIFIED	Santa Clara Unified	14,220	46%	116,396,229	9,818,349	8,185	(
Santa Cruz	ELEM	Bonny Doon Union Elementary	127	18%	536,043	117,428	4,225	!
Santa Cruz	ELEM	Happy Valley Elementary	109	12%	41,821	73,875	382	1
Santa Cruz	ELEM	Santa Cruz City Elementary	1,832	42%	9,072,761	1,104,695	4,953	1

Sonoma	ELEM	Alexander Valley Union Elementary	108	29%	678,844	298,328	6,301	2,
Sonoma	ELEM	Forestville Union Elementary	48	39%	1,543,589	439,479	31,978	9,
Sonoma	ELEM	Fort Ross Elementary	13	65%	179,867	72,066	13,585	5,
Sonoma	ELEM	Guerneville Elementary	24	60%	307,010	471,540	13,064	20,
Sonoma	ELEM	Horicon Elementary	56	84%	1,032,594	112,358	18,522	2,(
Sonoma	ELEM	Kenwood	58	23%	1,743,327	101,864	30,303	1,
Sonoma	ELEM	Monte Rio Union Elementary	69	73%	353,287	129,882	5,150	1,8
Sonoma	ELEM	Montgomery Elementary	20	56%	255,422	91,797	12,848	4,
Sonoma	UNIFIED	Geyserville Unified	125	59%	1,429,580	410,531	11,459	3,
Sonoma	UNIFIED	Healdsburg Unified	1,295	61%	6,859,207	1,012,698	5,295	
Sonoma	UNIFIED	Sonoma Valley Unified	3,422	57%	6,414,668	2,206,444	1,875	1
Tuolumne	ELEM	Twain Harte	251	50%	618,322	623,250	2,466	2,
Tuolumne	UNIFIED	Big Oak Flat- Groveland Unified	296	53%	875,087	657,983	2,951	2,

Source: CDE, 2022-23. Excludes County Offices of Education.

Questions & Comments

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